



IAS Release 3.0

Desktop User Guide

Prepared by CRI Solutions, Inc.

November 2006

Draft Version 1.3

Contents

CONTENTS.....	2
IAS RELEASE INFORMATION	6
IAS Release 3.0	6
INTRODUCTION TO IAS.....	7
Introduction	7
Did you know?.....	7
What is IAS Requisition Management?.....	7
Logging Into IAS.....	8
Reviewing the Shop Page	12
Reviewing the Preferences Page	14
Change your Password.....	15
Favorite Charge Accounts.....	17
HOW TO: Use Accounting Search and Select Feature	20
REQUISITIONS.....	27
Introduction	27
Objectives.....	27
Create a Simple Requisition	28
Stage 1: Starting a Requisition.....	28
Stage 2: Adding Line Items - Enter Requisition Details	28
HOW TO: Use Flashlight Search and Select Feature.....	31
Stage 3: Adding, Clearing, and Saving Requisition Items	36
Stage 4: Reviewing Requisition Items	38
Stage 5: Checkout	41
Printing Your Requisition Details.....	48

Creating a Complex Requisition.....	52
Stage 1: Starting a Requisition.....	52
Stage 2: Add a Line Item - Enter Requisition Details	52
Stage 3: Adding, Clearing, and Saving Requisition Items	54
Stage 4: Reviewing Requisition Items	54
Stage 5: Checkout	55
Tracking Requisition Status	73
Overview	73
Requisition Workflow	73
Accessing the Approval History in IAS	79
Changing a Requisition	86
Business Process.....	86
Pre-Order Number Changes & Cancellations	86
Post-Order Number Changes.....	90
Canceling Requisitions	95

REQUISITION APPROVAL	100
Introduction	100
Objectives	100
Management Approval	101
Budget (Funds) Approval	111
Reviewing the Requisition Details	112
HOW TO: Respond to Requisition Approvals and Change the Requisition	116
Edit the Requisition as the Approver	117
Canceling Requisitions	129
Business Process Guidelines	129
Cancel Requisition Process in IAS	131
Managing Notifications	135
Reassign Notifications During Absence	135
Step 1: Item Type	136
Step 2: Notification	136
Step 3: Rule Response	137

RECEIVING	140
Introduction	140
Objectives	140
The Receiving Page	140
Simple Receiving – Full Receipt	144
Step 1: Selecting Items	144
Step 2: Entering Receipt Information	148
Step 3: Submitting the Receipt	150
Complex Receiving – Partial Receipt.....	151
Partial Receipt Business Process	151
Creating a Partial Receipt	151
Viewing Receipts.....	158
Accessing the Receipt Status in IAS	159
HOW TO: Search for Receipts	162
Correcting Receipts	164
Return Receipts	168
CONCLUSION.....	175
Additional Resources	175
IAS Help Desk	175
IAS Portal Site	175

Tracking Requisition Status

Overview

In this section, the meaning of the messages that IAS generates will be explained along with how to use those messages track the status of your Requisition through key stages of the procurement process.

First, let's review the IAS messages.

When a Requisition is created and submitted, a history of Document Approval begins within IAS. At each approval point, the history will be updated with information about the Approver and the action taken. After the Requisition has been approved in FFIS, it is routed to the Acquisition Management module. An Award document is then created by the contracting staff. As the Award document is created after FFIS approval, it is not documented in the Approval History. At present, the approval information from the Acquisition Management module does not flow back into the Requisition Management module.

Tip! It is very important to track the status of your Requisition in IAS. There are several points in the Procurement process when the options for your Requisition change. For example, when the requisition is approved by the Budget Approver and accepted by FFIS, you can no longer edit the price of your items. Another example is when the Requisition gets tied to an award, the accounting and billing information can no longer be updated.

The Document Approval History is displayed on the *Approval History* page under the *Requisitions* tab in the IAS Requisition Management Module. It is also displayed on the *Route History* tab in the Acquisition Management module of IAS.

New Feature! In IAS Release 3.0, a user can track the status of the Receipt documents in FFIS. This feature will be covered later in this section.

Tip! Though the Requisition Management Module does not track the Document Approval History through the Acquisition process, a user can still determine when their document has been awarded to a vendor. To do this, simply go to the *Requisition Details* page and select the appropriate Requisition. If there is a Purchase Order number listed in the *Order* field, the Requisition has been awarded.

Note: Requisitions that have not been submitted do not have a status. They exist only in the shopping cart.

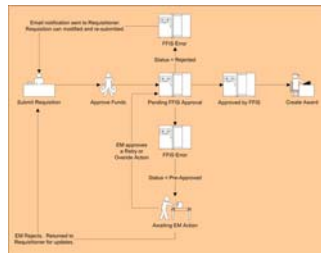
Requisition Workflow

A Requisition can be Approved or Rejected by FFIS. As stated above, when a Requisition is approved, it is routed to the Acquisition Management module. An Award document is then created in IAS by the contracting staff. If an error occurs in FFIS, the Requisition will not be approved and the status may remain as Pre-Approved or change to Rejected.

- FFIS Document Resolution Messages with a status of Pre-approved require action by a Document Resolution Manager. These messages, called Actionable Errors, are more commonly referred to as Soft Errors.

- FFIS Document Resolution Messages with a status of Rejected require action by the Requisitioner or the Budget Approver, who may request assistance from the Document Resolution Manager to understand and resolve the document. These messages are called Non-Actionable Errors, or are more commonly known as Hard Errors.

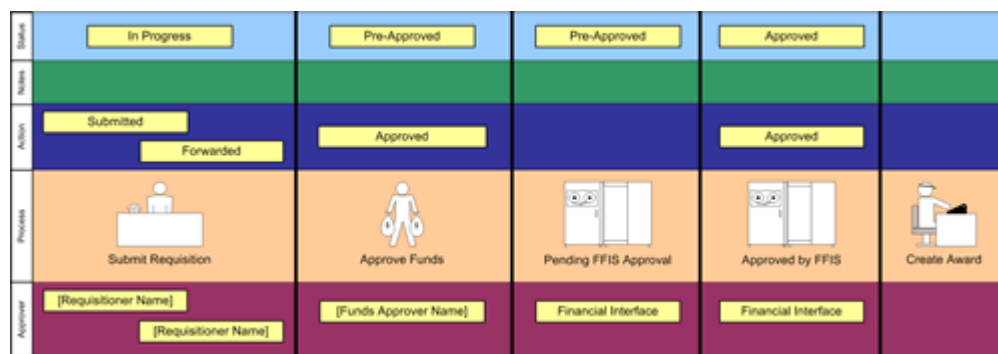
The following diagram depicts the Document Approval Workflow, including action required for Requisitions Approved or Rejected by FFIS.



See a full sized version of this flow chart at the end of this document.

Documents in Approved Status

The following diagram indicates points in the approval process at which the Document Approval History is updated, the associated approvers and messages.



See a full sized version of this flow chart at the end of this document.

First, the user submits the Requisition and IAS logs the Requisition with *Action* "Submitted". Then, IAS forwards the Requisition to the appropriate Approver and logs the Requisition as Action "Forwarded." The Requisitioner's name appears in the *Approver* field. Additionally, all of the Approvers in the Approval Chain for that Requisition are displayed.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Requisitions: Requisitions > Requisition 67064 >

Approval History for Requisition 67064

Sequence	Approver	Organization Name	Status	Action	Action Date	Notes
1	REQUISITIONER, DAVE	USDA	✓	Submitted	09-Nov-2006 15:11:51	
2	REQUISITIONER, DAVE	USDA	✓	Forwarded	09-Nov-2006 15:11:52	
3	MANAGER, SUSAN	USDA	✓	Pending		
4	MANAGER, BARRY	USDA	-			
5	MANAGER, CHARLIE	USDA	-			

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Since IAS is waiting for the first Approver in the chain to take action, IAS logs the current *Action* as "Pending." Once an Approver approves the Requisition, even if there is another Approver in the process, IAS changes the status of the Requisition to "Pre-Approved" and logs the action for that Approver as "Approved."

Once all of the Approvers have approved the Requisition, IAS sends the Requisition to FFIS for approval. At this point the status remains "Pre-Approved," IAS lists the *Approver* as "Interface, Financial," and logs the *Action* as "Pending." Below is an example of the Approval History for a Requisition that is pending FFIS Approval.

The screenshot shows the Oracle iProcurement interface in Microsoft Internet Explorer. The browser address bar shows a URL from green.usda.gov. The page title is "Oracle iProcurement". The navigation bar includes "Requisitions", "Notifications", and "Approvals". The "Requisitions" tab is selected, and the sub-tab "Approval History for Requisition 67149" is active. Below the navigation bar is a table with the following data:

Sequence	Approver	Organization Name	Status	Action	Action Date	Notes
1	REQUISITIONER_DAVE	USDA	✓	Submitted	17-Nov-2006 10:00:30	
2	REQUISITIONER_DAVE	USDA	✓	Forwarded	17-Nov-2006 10:00:30	
3	MANAGER_SUSAN	USDA	✓	Approved	17-Nov-2006 10:19:20	
4	MANAGER_CHARLIE	USDA	✓	Approved	17-Nov-2006 10:21:44	
5	INTERFACE_FINANCIAL	USDA	✓	Pending		

At the bottom of the table, there is a navigation bar with links: Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help. There are also "OK" buttons at the top right and bottom right of the table area.

Once FFIS accepts the Requisition, IAS changes the status of the Requisition to "Approved" and logs the *Action* as "Approved."

Below is an example of a fully-approved Requisition.

The screenshot shows the Oracle iProcurement interface in Microsoft Internet Explorer. The browser address bar shows a URL from green.usda.gov. The page title is "Oracle iProcurement". The navigation bar includes "Requisitions", "Notifications", and "Approvals". The "Requisitions" tab is selected, and the sub-tab "Approval History for Requisition 67064" is active. Below the navigation bar is a table with the following data:

Sequence	Approver	Organization Name	Status	Action	Action Date	Notes
1	REQUISITIONER_DAVE	USDA	✓	Submitted	09-Nov-2006 15:11:51	
2	REQUISITIONER_DAVE	USDA	✓	Forwarded	09-Nov-2006 15:11:52	
3	MANAGER_SUSAN	USDA	✓	Approved	09-Nov-2006 15:31:25	
4	MANAGER_BARRY	USDA	✓	Approved	13-Nov-2006 08:22:09	
5	MANAGER_CHARLIE	USDA	✓	Approved	13-Nov-2006 09:28:42	
6	INTERFACE_FINANCIAL	USDA	✓	Approved	13-Nov-2006 09:31:42	

At the bottom of the table, there is a navigation bar with links: Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help. There are also "OK" buttons at the top right and bottom right of the table area.

If the Requisition is rejected by an Approver, then IAS changes the status of the Requisition to "Rejected" and logs the *Action* as "Rejected." Below is an example of how that appears in the IAS Approval History.

ORACLE [®] iProcurement						
Shopping Cart Home Logout Preferences Help						
Shop Requisitions Receiving						
Requisitions Notifications Approvals						
Shop Stores >						
Approval History for Requisition 67151						
Sequence	Approver	Organization Name	Status	Action	Action Date	Notes
1	REQUISITIONER, DAVE	USDA	✓	Submitted	17-Nov-2006 10:08:11	
2	REQUISITIONER, DAVE	USDA	✓	Forwarded	17-Nov-2006 10:08:12	
3	MANAGER, SUSAN	USDA	✗	Rejected	17-Nov-2006 10:17:01	

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

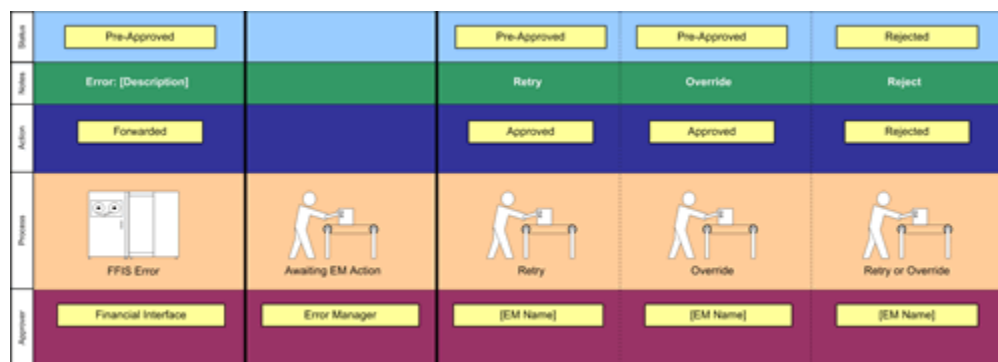
Documents Requiring Resolution – Pre-Approved Status

If a Document Resolution Message is generated and the Requisition has a Pre-approved status, the Document Approval History updates to indicate that the document is awaiting a response from a Document Resolution Manager. At this point, the title Document Resolution Manager is displayed as the Approver, as a specific individual has not yet been identified.

Once a Document Resolution Manager has responded to the message, the Document Approval History updates the name of the Document Resolution Manager who took action on the document, as well as the date and a description of the action. For instance, a Document Resolution Manager may take any of the following actions; *Override*, *Retry* or *Reject*.

Insufficient apportionment or allocation funds are examples of Actionable messages that leave the document in Pre-Approved status. A Document Resolution Manager needs to perform an action, such as executing a *Retry*, before the Requisition can be approved in FFIS.

The following diagram indicates the points in the approval process at which the Document Approval History is updated, who is listed in the *Approvers* field and which messages are logged by IAS.



See a full sized version of this flow chart at the end of this document.

Let's look at another example. The Requisition is rejected by FFIS because of *Insufficient Allocation and Insufficient Apportionment of Funds*. The Document Approval History at this point would indicate that the Requisition is awaiting action from a Document Resolution Manager yet to be identified.

Approval History for Requisition 6535

Sequence	Approver	Action	Action Date	Notes
1	REQUISITIONER, RALPH TEST	✓ Submitted	02-MAY-2005	
2	REQUISITIONER, RALPH TEST	✓ Reserved	02-MAY-2005	
3	REQUISITIONER, RALPH TEST	✓ Forwarded	02-MAY-2005	
4	MANAGER, ANN TEST	✓ Approved	02-MAY-2005	
5	INTERFACE, FINANCIAL	✓ Forwarded	02-MAY-2005	First two errors are: SC150INSUFFICIENT ALLOCATION FUNDS;SC200INSUFFICNT APPROPRIATION FUNDS
6	MANAGER, ERROR POOL	Pending		

The Document Resolution Manager enters an *Override* action to re-submit the document to FFIS for approval.

Approval History for Requisition 6535

Sequence	Approver	Action	Action Date	Notes
1	REQUISITIONER, RALPH TEST	✓ Submitted	02-MAY-2005	
2	REQUISITIONER, RALPH TEST	✓ Reserved	02-MAY-2005	
3	REQUISITIONER, RALPH TEST	✓ Forwarded	02-MAY-2005	
4	MANAGER, ANN TEST	✓ Approved	02-MAY-2005	
5	INTERFACE, FINANCIAL	✓ Forwarded	02-MAY-2005	First two errors are: SC150INSUFFICIENT ALLOCATION FUNDS;SC200INSUFFICNT APPROPRIATION FUNDS
6	MANAGER, ERROR POOL	✓ No action taken	02-MAY-2005	
7	INTERFACE_MGR, RD1 TEST	✓ Approved	02-MAY-2005	Action By Error Manager - Override

The document is finally *Approved* by FFIS.

Approval History for Requisition 6535

Sequence	Approver	Action	Action Date	Notes
1	REQUISITIONER, RALPH TEST	✓ Submitted	02-MAY-2005	
2	REQUISITIONER, RALPH TEST	✓ Reserved	02-MAY-2005	
3	REQUISITIONER, RALPH TEST	✓ Forwarded	02-MAY-2005	
4	MANAGER, ANN TEST	✓ Approved	02-MAY-2005	
5	INTERFACE, FINANCIAL	✓ Forwarded	02-MAY-2005	First two errors are: SC150INSUFFICIENT ALLOCATION FUNDS;SC200INSUFFICNT APPROPRIATION FUNDS
6	MANAGER, ERROR POOL	✓ No action taken	02-MAY-2005	
7	INTERFACE_MGR, RD1 TEST	✓ Approved	02-MAY-2005	Action By Error Manager - Override
8	INTERFACE, FINANCIAL	✓ Approved	02-MAY-2005	

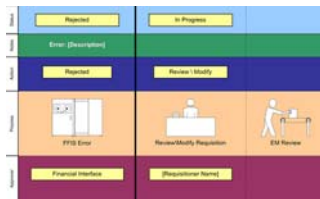
Documents Requiring Resolution – Rejected Status

For document messages with a status of *Rejected*, action is required by the Requisitioner and a summary of the message is given in the Document Approval History. After the Requisition has been modified, it is re-submitted and forwarded per the normal document approval workflow.

Invalid Budget Code is a common example of this type of error. If the Budget Code entered for a Requisition is not available for Commitment or doesn't have sufficient available funds, the document will be rejected by FFIS and requires action from the Requisitioner or Budget Approver to update the document with a new Budget Code.

Tip! Although the Requisitioner or Budget Approver may contact the Document Resolution Manager for assistance with interpreting the FFIS message, action from the Document Resolution Manager is not required.

The following diagram indicates the points in the approval process that the Document Approval History is updated, the associated *Approvers* and *messages*.



See a full sized version of this flow chart at the end of this document.

In the Approval History, the action of *Rejected* is entered, alerting the Requisitioner that action is required for the Requisition to be approved by FFIS.

ORACLE® iProcurement						
Shopping Cart Home Logout Preferences Help						
Shop Requisitions Receiving						
Requisitions Notifications Approvals						
Shop Stores >						
Approval History for Requisition 67152						
Sequence	Approver	Organization Name	Status	Action	Action Date	Notes
1	REQUISITIONER, DAVE	USDA	✓	Submitted	17-Nov-2006 10:59:23	
2	REQUISITIONER, DAVE	USDA	✓	Forwarded	17-Nov-2006 10:59:25	
3	MANAGER, SUSAN	USDA	✓	Approved	17-Nov-2006 11:48:52	
4	MANAGER, CHARLIE	USDA	✓	Approved	17-Nov-2006 11:51:13	
5	INTERFACE, FINANCIAL	USDA	✗	Rejected	17-Nov-2006 11:54:31	SC22ECOMM S INVALID FOR EXPRED FUND

The original Requisitioner then updates the document with the correct information and resubmits the Requisition to the Funds Approver. Although the Document Resolution Manager does not take any action, they may still review the error message and may be contacted by the Requisitioner for assistance.

ORACLE [®] iProcurement						
Shopping Cart Home Logout Preferences Help						
Shop Requisitions Receiving						
Requisitions Notifications Approvals						
Shop Stores >						
Approval History for Requisition 67152						
Sequence	Approver	Organization Name	Status	Action	Action Date	Notes
1	REQUISITIONER, DAVE	USDA	✓	Submitted	17-Nov-2006 10:59:23	
2	REQUISITIONER, DAVE	USDA	✓	Forwarded	17-Nov-2006 10:59:25	
3	MANAGER, SUSAN	USDA	✓	Approved	17-Nov-2006 11:48:52	
4	MANAGER, CHARLIE	USDA	✓	Approved	17-Nov-2006 11:51:13	
5	INTERFACE, FINANCIAL	USDA	✗	Rejected	17-Nov-2006 11:54:31	SC22ECOMM S INVALID FOR EXPRED FUND
6	REQUISITIONER, DAVE	USDA	✓	Submitted	17-Nov-2006 12:16:14	
7	REQUISITIONER, DAVE	USDA	✓	Forwarded	17-Nov-2006 12:16:15	
8	MANAGER, SUSAN	USDA	✓	Pending		
9	MANAGER, CHARLIE	USDA				

If the Requisition details are now correct then the document should be approved by FFIS.

ORACLE [®] iProcurement						
Shopping Cart Home Logout Preferences Help						
Shop Requisitions Receiving						
Requisitions Notifications Approvals						
Shop Stores >						
Approval History for Requisition 67152						
Sequence	Approver	Organization Name	Status	Action	Action Date	Notes
1	REQUISITIONER, DAVE	USDA	✓	Submitted	17-Nov-2006 10:59:23	
2	REQUISITIONER, DAVE	USDA	✓	Forwarded	17-Nov-2006 10:59:25	
3	MANAGER, SUSAN	USDA	✓	Approved	17-Nov-2006 11:48:52	
4	MANAGER, CHARLIE	USDA	✓	Approved	17-Nov-2006 11:51:13	
5	INTERFACE, FINANCIAL	USDA	✗	Rejected	17-Nov-2006 11:54:31	SC22ECOMM S INVALID FOR EXPRED FUND
6	REQUISITIONER, DAVE	USDA	✓	Submitted	17-Nov-2006 12:16:14	
7	REQUISITIONER, DAVE	USDA	✓	Forwarded	17-Nov-2006 12:16:15	
8	MANAGER, SUSAN	USDA	✓	Approved	17-Nov-2006 12:17:57	
9	MANAGER, CHARLIE	USDA	✓	Approved	17-Nov-2006 12:18:37	
10	INTERFACE, FINANCIAL	USDA	✓	Approved	17-Nov-2006 12:20:41	

Next, you will learn how to view the Document Approval History in IAS.

Accessing the Approval History in IAS

There are several ways to access this information. Though we will cover different paths to access the status information, most can be used at any stage of the Requisition process.

First, you will begin with a Requisition that has already been submitted to IAS. The first way to get to the *Approval History* page is through the *Requisition Details* page. Starting at the *Home* page, click on the **Requisitions** tab in the top-right corner of the screen.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Stores | Categories | Shopping Lists | Non-Catalog Request

Search Exchange.Oracle.com Go Advanced Search

Stores

Main Store Exchange.Oracle.com

My Requisitions

Requisition	Description	Total (USD)	Status	Copy	Change	Receive
67064	IBM ThinkPad Laptops for remote employees	10000.00	In Process			
67024	Contract to maintain grounds of local reserve	743600.00	In Process			

My Notifications

Type	From	Subject	Sent
No data exists.			

TIP Vacation Rules - Redirect or auto-respond to notifications.

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

This will take you to the *Requisitions* page. This is where all of the Requisitions you've previously created are listed. Find the Requisition that you would like to track, and click on the name of the Requisition or the Requisition number.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Requisitions

Views

View All My Requisitions Go

Indicates requisition with a pending change request.

Select requisition: Copy To Cart Cancel Requisition Change Complete

Select Requisition	Description	Total (USD)	Creation Date	Status	Order
67064	IBM ThinkPad Laptops for remote employees	10000.00	09-Nov-2006 14:44:27	In Process	
67024	Contract to maintain grounds of local reserve	743600.00	07-Nov-2006 15:16:51	In Process	

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

This will take you to the *Requisition Details* page. This shows you the basic information about your Requisition. You can see the current status of your Requisition in the upper right section of the screen. Since the Requisition has just been submitted, the *Status* field says "In Process."

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Requisitions, Requisitions >

Requisition 67064

Description IBM ThinkPad Laptops for remote employees

Created By REQUISITIONER, DAVE

Creation Date 09-Nov-2006 14:44:27

Deliver-To 3101 PARK CENTER DRIVE ROOM 906 ALEXANDRIA, VA, 22302

Justification

Status In Process

Change Request No

Urgent Requisition No

Attachment None

Note to Buyer

Details

Line	Description	Need-By	Deliver-To	Unit	Quantity	Price	Amount (USD)	Details	Order
1	IBM ThinkPad Laptops for remote employees	29-Dec-2006 00:00:00	FNS-HQ-ADMIN	EACH	4	2500 USD	10000.00		
Total							10000.00		

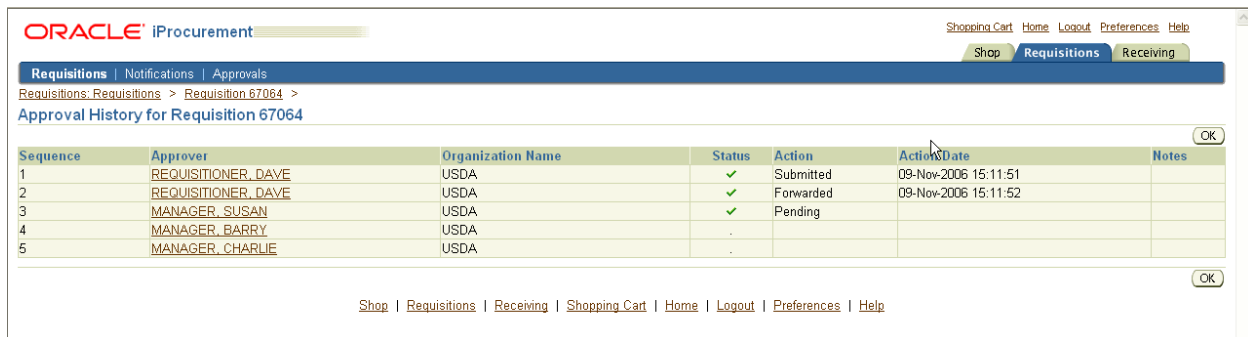
Return

Copy To Cart Cancel Requisition Change

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

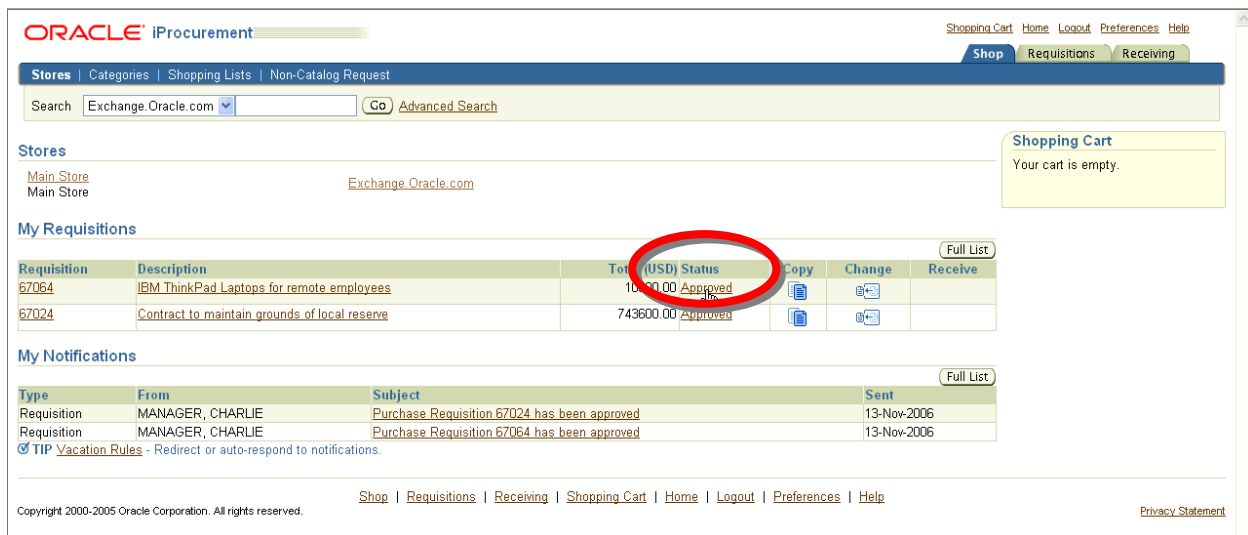
From here, click on the link stating the current status, “In Process” in our example. This will take you to the *Requisition Approval History* page.



Sequence	Approver	Organization Name	Status	Action	Action Date	Notes
1	REQUISITIONER_DAVE	USDA	✓	Submitted	09-Nov-2006 15:11:51	
2	REQUISITIONER_DAVE	USDA	✓	Forwarded	09-Nov-2006 15:11:52	
3	MANAGER_SUSAN	USDA	✓	Pending		
4	MANAGER_BARRY	USDA	-			
5	MANAGER_CHARLIE	USDA	-			

Notice that all of the Approvers in the Approval Chain are listed here. As they approve or reject the Requisition, this information will update and the status of the document will change appropriately.

IAS also allows you to navigate to the *Requisition Approval History* page from the main *Shop* page. Simply click on the status link there.



Requisition	Description	Total (USD)	Status	Copy	Change	Receive
67064	IBM ThinkPad Laptops for remote employees	10,000.00	Approved			
67024	Contract to maintain grounds of local reserve	743600.00	Approved			

Type	From	Subject	Sent
Requisition	MANAGER_CHARLIE	Purchase Requisition 67024 has been approved	13-Nov-2006
Requisition	MANAGER_CHARLIE	Purchase Requisition 67064 has been approved	13-Nov-2006

Tip! Every time you see the status of a Requisition on any page, it is usually a link directly to the Document Approval History for that Requisition. Just click on it to see the Document Approval History.

Seeing Acquisition Information in the Requisition Module

Previously in IAS, you could see that there was an award associated with your Requisition, but the information you could see about the award was limited. In IAS Release 3.0, Requisitioners have access to enhanced section that details more about the Awards.

On the *Requisition - Award Details* page the Requisitioner can now see the following information:

- Order number, date and status

- Total amount obligated
- Supplier's name, location and address
- Buyer's name and a link that will allow the Requisitioner to email the Buyer
- Term's and Conditions of the order
- Billing and Shipping Addresses
- Detailed line item information

ORACLE® iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Shop](#) [Requisitions](#) [Receiving](#)

[Requisitions](#) | [Notifications](#) | [Approvals](#)

[Requisitions: Requisitions](#) > [Requisition 67064](#) >

Standard PO : AG-1358-P-07-0003 Revision 0 (Total USD 15000.00) Ok

Order Information

General Information	Terms and Conditions
Standard PO: AG-1358-P-07-0003	Payment Terms
Total: 15000.00 (USD)	Carrier
Supplier: IBM - 130871985	FOB
Supplier Site: 130871985 8	Freight Terms
Address: P.O. BOX 360091	Shipping Control
130871985 8	
PITTSBURGH, PA 15250	Bill-To Address
Buyer: CONTRACTING OFFICER, ERICA	Bill-To Address: 3101 PARK CENTER DRIVE
Order Date: 14-Nov-2006 12:47:13	ROOM 906
Description: IBM ThinkPad Laptops for remote employees	ALEXANDRIA, VA 22302
Status: Approved	Ship-To Address
Note to Supplier	Ship-To Address: 3101 PARK CENTER DRIVE
Organization: USDA-OU	ROOM 906
Supplier Order Number	ALEXANDRIA, VA 22302
Attachments: None	

PO Details

TIP Click on the Show link to view shipment details of a line.

Indicates new values

Indicates cancellation request

[Show All](#) [Hide All](#)

Details	Line	Type	Item	Job	Supplier	Description	UOM	Quantity	Price (USD)	Amount (USD)	Contractor Name	Status	Reason	Global Agreement	Attachments	Price Differentials
	1	Goods				IBM ThinkPad Laptops for remote employees	EACH	6	2500	15000.00		Open				

Shipments

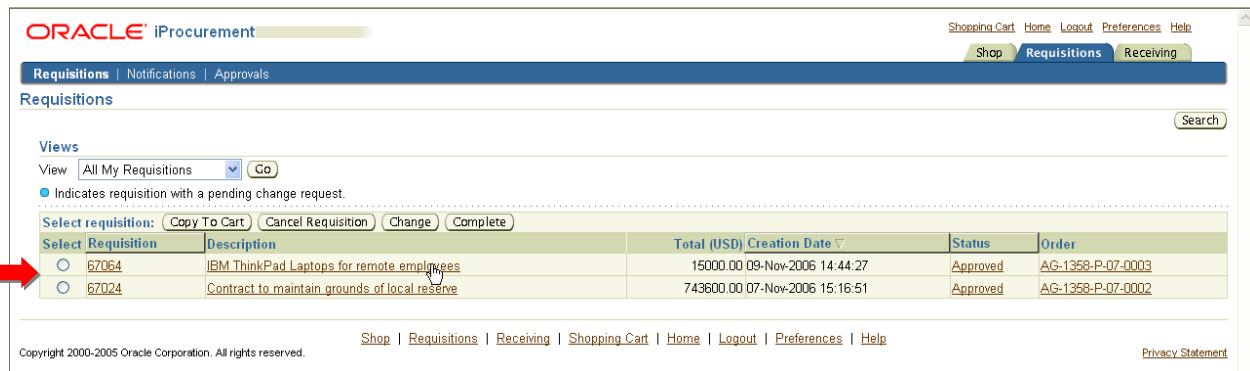
Shipment	Quantity	Ordered	Quantity Received	Amount(USD)	Promised Date	Need-By Date	Supplier	Order Line	Ship-To Location	Status	Reason	Split	Attachments
10001	6			0 15000.00		29-Dec-2006 00:00:00			FNS-HQ-ADMIN	Open			

Ok

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved. [Privacy Statement](#)

The link to this information is on the *Requisition Details* page. To get there, find your Requisition by one of the methods detailed above. In the following example, the Requisition is recent and so it is listed on the main *Requisitions* page.



ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Requisitions

Views

View All My Requisitions (Go)

Indicates requisition with a pending change request.

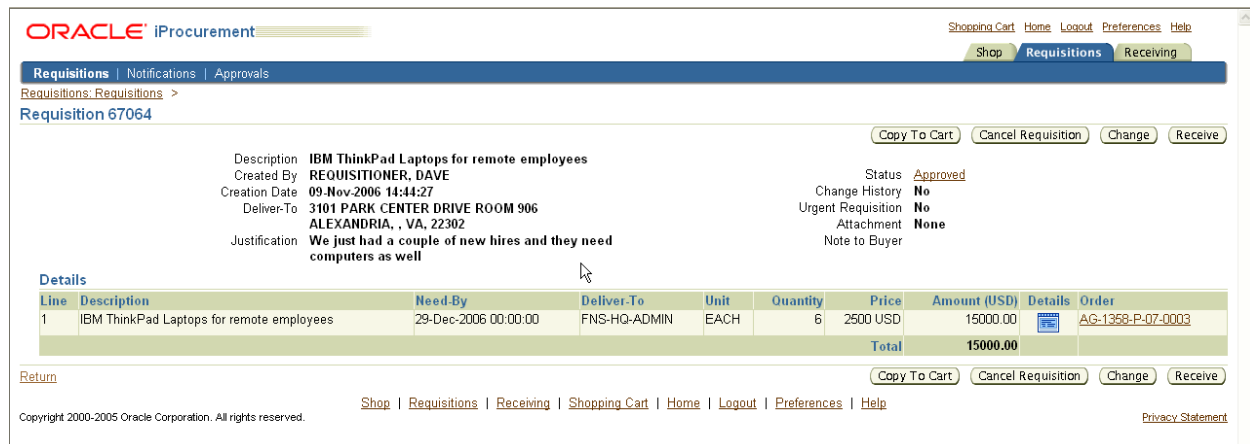
Select requisition: Copy To Cart Cancel Requisition Change Complete

Select	Requisition	Description	Total (USD)	Creation Date	Status	Order
<input type="radio"/>	67064	IBM ThinkPad Laptops for remote employees	15000.00	09-Nov-2006 14:44:27	Approved	AG-1358-P-07-0003
<input type="radio"/>	67024	Contract to maintain grounds of local reserve	743600.00	07-Nov-2006 15:16:51	Approved	AG-1358-P-07-0002

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Click on the **Requisition name**, as in the above example, or the Requisition number to get to the *Requisition Details* screen.



ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Requisitions: Requisitions >

Requisition 67064

Copy To Cart Cancel Requisition Change Receive

Description IBM ThinkPad Laptops for remote employees

Created By REQUISITIONER, DAVE

Creation Date 09-Nov-2006 14:44:27

Deliver-To 3101 PARK CENTER DRIVE ROOM 906

ALEXANDRIA, VA, 22302

Justification We just had a couple of new hires and they need computers as well

Status Approved

Change History No

Urgent Requisition No

Attachment None

Note to Buyer

Details

Line	Description	Need-By	Deliver-To	Unit	Quantity	Price	Amount (USD)	Details	Order
1	IBM ThinkPad Laptops for remote employees	29-Dec-2006 00:00:00	FNS-HQ-ADMIN	EACH	6	2500 USD	15000.00		AG-1358-P-07-0003
Total							15000.00		

Return

Copy To Cart Cancel Requisition Change Receive

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Notice that there is an order number listed in the *Order* column, and that the number is a link. Click on the Order Number link.



ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Requisitions: Requisitions >

Requisition 67064

Copy To Cart Cancel Requisition Change Receive

Description IBM ThinkPad Laptops for remote employees

Created By REQUISITIONER, DAVE

Creation Date 09-Nov-2006 14:44:27

Deliver-To 3101 PARK CENTER DRIVE ROOM 906

ALEXANDRIA, VA, 22302

Justification We just had a couple of new hires and they need computers as well

Status Approved

Change History No

Urgent Requisition No

Attachment None

Note to Buyer

Details

Line	Description	Need-By	Deliver-To	Unit	Quantity	Price	Amount (USD)	Details	Order
1	IBM ThinkPad Laptops for remote employees	29-Dec-2006 00:00:00	FNS-HQ-ADMIN	EACH	6	2500 USD	15000.00		AG-1358-P-07-0003
Total							15000.00		

Return

Copy To Cart Cancel Requisition Change Receive

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

This will take you to the *Requisition - Award Details* page.

ORACLE iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Shop](#) [Requisitions](#) [Receiving](#)

[Requisitions](#) | [Notifications](#) | [Approvals](#)

[Requisitions: Requisitions](#) > [Requisition 67064](#) >

Standard PO : AG-1358-P-07-0003 Revision 0 (Total USD 15000.00) [Ok](#)

▼ Order Information

General Information		Terms and Conditions	
Standard PO	AG-1358-P-07-0003	Payment Terms	
Total	15000.00 (USD)	Carrier	
Supplier	IBM - 130871985	FOB	
Supplier Site	130871985 8	Freight Terms	
Address	P.O. BOX 360091 130871985 8 PITTSBURGH, PA 15250	Shipping Control	
Buyer	CONTRACTING OFFICER, ERICA	Bill-To Address	
Order Date	14-Nov-2006 12:47:13	Bill-To Address	3101 PARK CENTER DRIVE ROOM 906 ALEXANDRIA, VA 22302
Description	IBM ThinkPad Laptops for remote employees	Ship-To Address	
Status	Approved	Ship-To Address	3101 PARK CENTER DRIVE ROOM 906 ALEXANDRIA, VA 22302
Note to Supplier			
Organization	USDA-OU		
Supplier Order Number			
Attachments	None		

PO Details

TIP Click on the Show link to view shipment details of a line.

Indicates new values

Indicates cancellation request

[Show All](#) [Hide All](#)

Details	Line	Type	Item	Job	Supplier	Description	UOM	Quantity	Price (USD)	Amount (USD)	Contractor Name	Status	Reason	Global Agreement	Attachments	Price Differentials
▶ Show	1	Goods				IBM ThinkPad Laptops for remote employees	EACH	6	2500	15000.00		Open				

[Ok](#)

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved. [Privacy Statement](#)

You can view more information about the line items by clicking on the **Show** link under the *Details* column in the *PO Details* section.

PO Details

TIP Click on the Show link to view shipment details of a line.

Indicates new values

Indicates cancellation request

[Show All](#) [Hide All](#)

Details	Line	Type	Item	Job	Supplier	Description
▶ Show	1	Goods				IBM ThinkPad Laptops for remote employees

[Shop](#) | [Requisitions](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved.

This will open up the line item information.

PO Details

 **TIP** Click on the Show link to view shipment details of a line.

 Indicates new values

 Indicates cancellation request

[Show All](#) [Hide All](#)

Details	Line	Type	Item	Job	Supplier	Description	UOM	Quantity	Price (USD)	Amount (USD)	Contractor Name	Status	Reason	Global Agreement	Attachments	Price Differentials
	1	Goods				IBM ThinkPad Laptops for remote employees	EACH	6	2500	15000.00		Open				

Shipments

Shipment	Quantity	Ordered	Quantity Received	Amount(USD)	Promised Date	Need By Date	Supplier	Order Line	Ship-To Location	Status	Reason	Split	Attachments
10001	6			0 15000.00		29-Dec-2006 00:00:00			FNS-HQ-ADMIN	Open			

[Ok](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved.

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

[Privacy Statement](#)

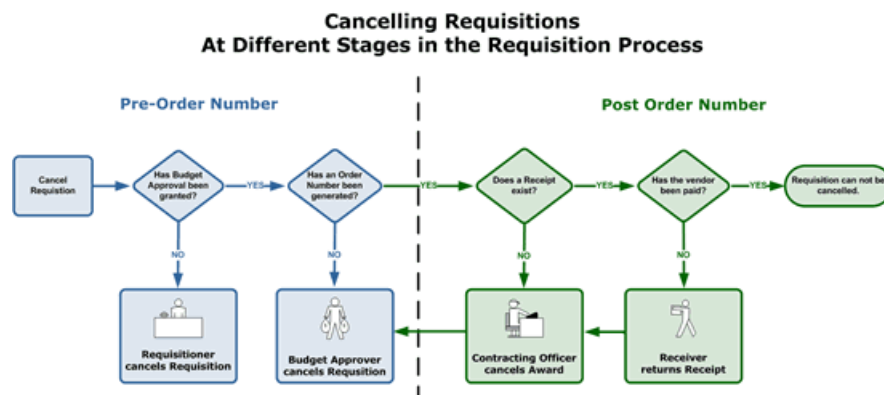
Changing a Requisition

Business Process

Different processes are used to change or cancel a Requisition. The process used is dependent on the assignment of an Order Number to the Requisition. Order Numbers are assigned to a Requisition within IAS when an obligation document, e.g. PO or Contract, is created. The primary difference between these methods is the number of fields available for modification. It is also important to note that only certain people have rights to make changes or cancellations at various stages of the requisition process.

A Requisitioner can make changes to a Requisition both before and after an Order Number has been assigned, but can only cancel a requisition if the funds have not been committed by a Budget Approver. After commitment of funds only a Budget Approver has FFIS authority to cancel a Requisition.

As a Requisition progresses further through the approval process associated documents may need to be cancelled before a Budget Approver is able to cancel a Requisition. For instance, if a receipt has been created, but payment has not been made the receipt must be returned and the Award document must be cancelled before a Requisition can be cancelled. After payment has been made to the vendor, however, the procurement process can not be reversed and a Requisition can no longer be cancelled. The diagram below illustrates the steps that must be taken to cancel a Requisition at various stages of the procurement process.



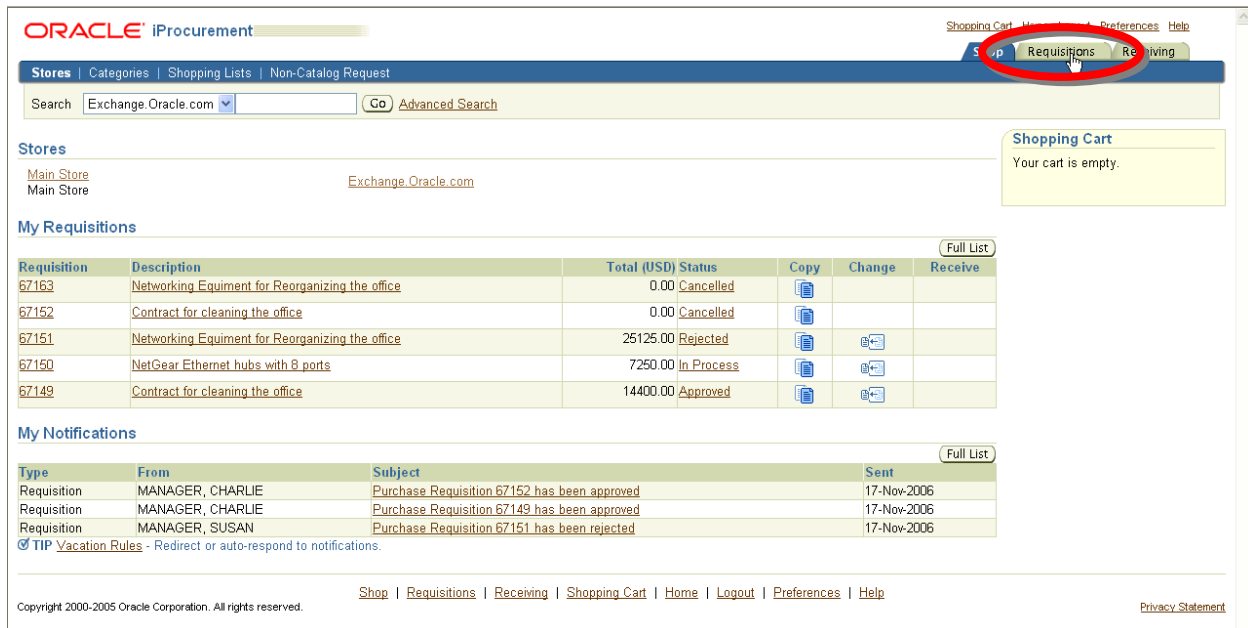
See a full sized version of this flow chart at the end of this document.

Pre-Order Number Changes & Cancellations

This section will cover how to go into IAS as a Requisitioner and change a Requisition. In the following example, the Requisition for cleaning services that are billed by dollar amount has been approved by a Budget Approver. When the Contracting Officer tried to get a vendor for the contract, the bid came in higher than the original cost. To allow the Contracting Officer to award the Requisition, the Requisitioner has to go back in and

increase the dollar amount. This then sends the Requisition back through the standard approval chain before it goes back to the Contracting Officer for award.

To change a Requisition, access the Requisition by clicking on the **Requisitions** tab at the top-right corner of the screen.



ORACLE iProcurement

Shopping Cart | Home | Logout | Preferences | Help

Shop | **Requisitions** | Receiving

Stores | Categories | Shopping Lists | Non-Catalog Request

Search Exchange Oracle.com Go Advanced Search

Stores

Main Store Exchange Oracle.com

My Requisitions (Full List)

Requisition	Description	Total (USD)	Status	Copy	Change	Receive
67163	Networking Equipment for Reorganizing the office	0.00	Cancelled			
67152	Contract for cleaning the office	0.00	Cancelled			
67151	Networking Equipment for Reorganizing the office	25125.00	Rejected			
67150	NetGear Ethernet hubs with 8 ports	7250.00	In Process			
67149	Contract for cleaning the office	14400.00	Approved			

My Notifications (Full List)

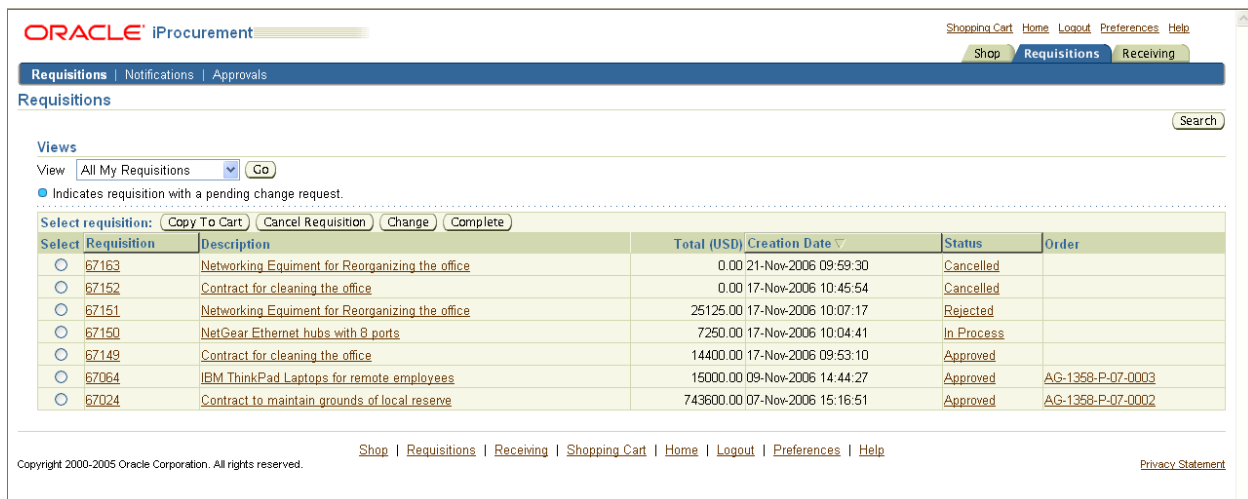
Type	From	Subject	Sent
Requisition	MANAGER, CHARLIE	Purchase Requisition 67152 has been approved	17-Nov-2006
Requisition	MANAGER, CHARLIE	Purchase Requisition 67149 has been approved	17-Nov-2006
Requisition	MANAGER, SUSAN	Purchase Requisition 67151 has been rejected	17-Nov-2006

TIP Vacation Rules - Redirect or auto-respond to notifications.

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

This will take you to the *Requisitions* page.



ORACLE iProcurement

Shopping Cart | Home | Logout | Preferences | Help

Shop | **Requisitions** | Receiving

Requisitions | Notifications | Approvals

Requisitions (Search)

Views

View All My Requisitions Go

Indicates requisition with a pending change request.

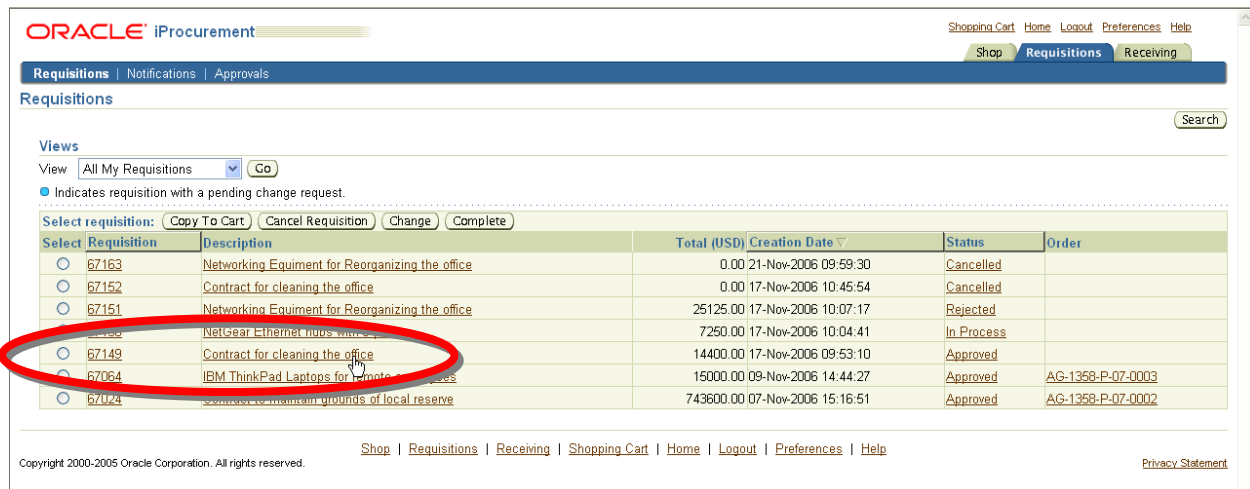
Select requisition: Copy To Cart Cancel Requisition Change Complete

Select	Requisition	Description	Total (USD)	Creation Date	Status	Order
<input type="radio"/>	67163	Networking Equipment for Reorganizing the office	0.00	21-Nov-2006 09:59:30	Cancelled	
<input type="radio"/>	67152	Contract for cleaning the office	0.00	17-Nov-2006 10:45:54	Cancelled	
<input type="radio"/>	67151	Networking Equipment for Reorganizing the office	25125.00	17-Nov-2006 10:07:17	Rejected	
<input type="radio"/>	67150	NetGear Ethernet hubs with 8 ports	7250.00	17-Nov-2006 10:04:41	In Process	
<input type="radio"/>	67149	Contract for cleaning the office	14400.00	17-Nov-2006 09:53:10	Approved	
<input type="radio"/>	67064	IBM ThinkPad Laptops for remote employees	15000.00	09-Nov-2006 14:44:27	Approved	AG-1358-P-07-0003
<input type="radio"/>	67024	Contract to maintain grounds of local reserve	743600.00	07-Nov-2006 15:16:51	Approved	AG-1358-P-07-0002

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

In this example, the Requisition number 67419 will be modified. Click on the title or Requisition number to go to the *Requisition Details* page.



ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Requisitions Search

Views

View: All My Requisitions Go

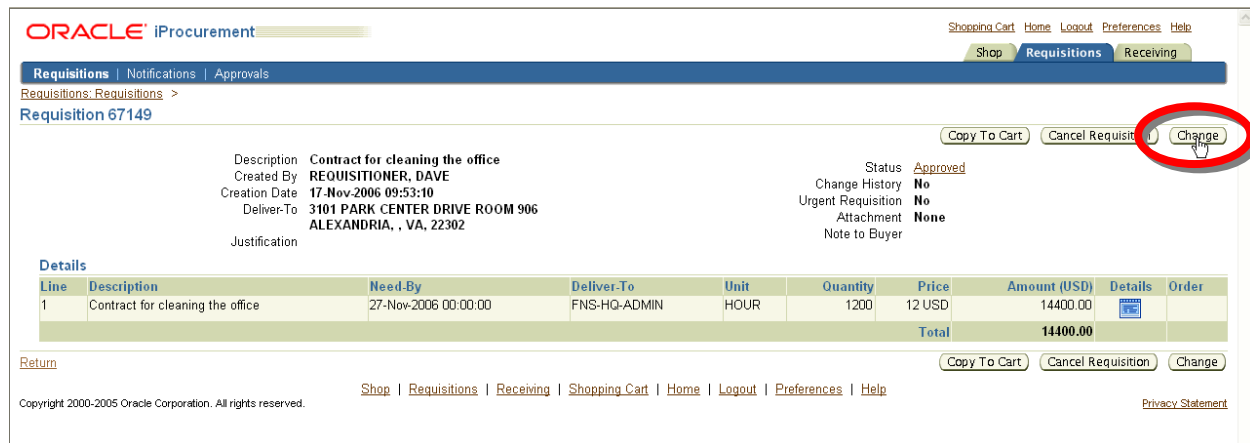
Indicates requisition with a pending change request.

Select requisition: Copy To Cart Cancel Requisition Change Complete

Select	Requisition	Description	Total (USD)	Creation Date	Status	Order
<input type="radio"/>	67163	Networking Equipment for Reorganizing the office	0.00	21-Nov-2006 09:59:30	Cancelled	
<input type="radio"/>	67152	Contract for cleaning the office	0.00	17-Nov-2006 10:45:54	Cancelled	
<input type="radio"/>	67151	Networking Equipment for Reorganizing the office	25125.00	17-Nov-2006 10:07:17	Rejected	
<input type="radio"/>	67150	NetGear Ethernet hubs	7250.00	17-Nov-2006 10:04:41	In Process	
<input type="radio"/>	67149	Contract for cleaning the office	14400.00	17-Nov-2006 09:53:10	Approved	
<input type="radio"/>	67064	IBM ThinkPad Laptops for remote employees	15000.00	09-Nov-2006 14:44:27	Approved	AG-1358-P-07-0003
<input type="radio"/>	67024	Contract to maintain grounds of local reserve	743600.00	07-Nov-2006 15:16:51	Approved	AG-1358-P-07-0002

Copyright 2000-2005 Oracle Corporation. All rights reserved. Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help Privacy Statement

Click on the **Change** button to send this Requisition back to the *Shopping Cart*.



ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Requisitions: Requisitions >

Requisition 67149

Copy To Cart Cancel Requisition **Change**

Description: Contract for cleaning the office
 Created By: REQUISITIONER, DAVE
 Creation Date: 17-Nov-2006 09:53:10
 Deliver-To: 3101 PARK CENTER DRIVE ROOM 906
 ALEXANDRIA, VA, 22302
 Justification:

Status: **Approved**
 Change History: **No**
 Urgent Requisition: **No**
 Attachment: **None**
 Note to Buyer:

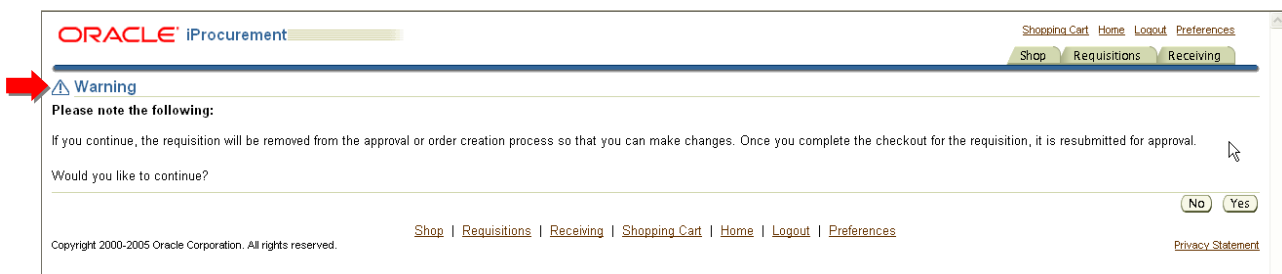
Details

Line	Description	Need-By	Deliver-To	Unit	Quantity	Price	Amount (USD)	Details	Order
1	Contract for cleaning the office	27-Nov-2006 00:00:00	FNS-HQ-ADMIN	HOURL	1200	12 USD	14400.00		
Total							14400.00		

[Return](#) Copy To Cart Cancel Requisition Change

Copyright 2000-2005 Oracle Corporation. All rights reserved. Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help Privacy Statement

Before you get to the *Shopping Cart*, IAS gives you a warning screen.



ORACLE iProcurement

Shopping Cart Home Logout Preferences

Shop Requisitions Receiving

Warning

Please note the following:

If you continue, the requisition will be removed from the approval or order creation process so that you can make changes. Once you complete the checkout for the requisition, it is resubmitted for approval.

Would you like to continue?

No Yes

Copyright 2000-2005 Oracle Corporation. All rights reserved. Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences Privacy Statement

The warning states:

"If you continue, the requisition will be removed from the approval or order creation process so that you can make changes. Once you complete the checkout for the requisition, it is resubmitted for approval.

Would you like to continue?"

This warning is to notify you that the Requisition is going to be resubmitted for approval. This is the proper process. If you are ready to continue, click the **Yes** button. This will bring you to the *Shopping Cart* page.

ORACLE iProcurement

Shopping Cart | Home | Logout | Preferences | Help

Shop | Requisitions | Receiving

Shopping Cart

Save | Checkout

Line	Item Description	Special Info	Unit	Quantity	Price	Amount (USD)	Delete
1	Contract for cleaning the office		HOUR	1200	12 USD	14400.00	
Total						14400.00	

Return to Shopping

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Privacy Statement

The *Shopping Cart* and *Checkout* Screens in the change Requisition process work essentially the same as they did in the Requisition creation process. The biggest difference is that you cannot change the price of an existing line item. You can only change the quantity.

Tip! If you would like to add an additional line to the Requisition, return to the *Shop* page by clicking on the **Shop** tab and then click on the **Non-Catalog Request** link. Though it seems like you are creating a new Requisition, you are simply adding items to the Shopping Cart you just reopened.

To continue, update the quantity appropriately, and click on the **Checkout** button to move on to the checkout process.

ORACLE iProcurement

Shopping Cart | Home | Logout | Preferences | Help

Shop | Requisitions | Receiving

Shopping Cart

Save | Checkout

Line	Item Description	Special Info	Unit	Quantity	Price	Amount (USD)	Delete
1	Contract for cleaning the office		HOUR	1600	12 USD	19200.00	
Total						19200.00	

Return to Shopping

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Privacy Statement

This will take you to the first step in the checkout process, Enter/Change Requisition Information.

ORACLE iProcurement

Shopping Cart | Home | Logout | Preferences

Shop | Requisitions | Receiving

Requisition Information | Approvers | Review & Submit

Checkout: Requisition Information

* Indicates required field

Cancel | Save | Edit Lines (Delivery, Billing, Accounts and Attachments) | Step 1 of 3 | Next

* Requisition Description Contract for cleaning the office

Delivery

* Need-By Date 30-Nov-2006 00:00:00 (example: 28-Nov-2006 19:45:00)

Requester REQUISITIONER, DAVE

* Deliver-To Location FNS-HQ-ADMIN

Billing

* Taxable No

* Transaction Code IQ-COMMIT

Cancel | Save | Edit Lines (Delivery, Billing, Accounts and Attachments) | Step 1 of 3 | Next

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences

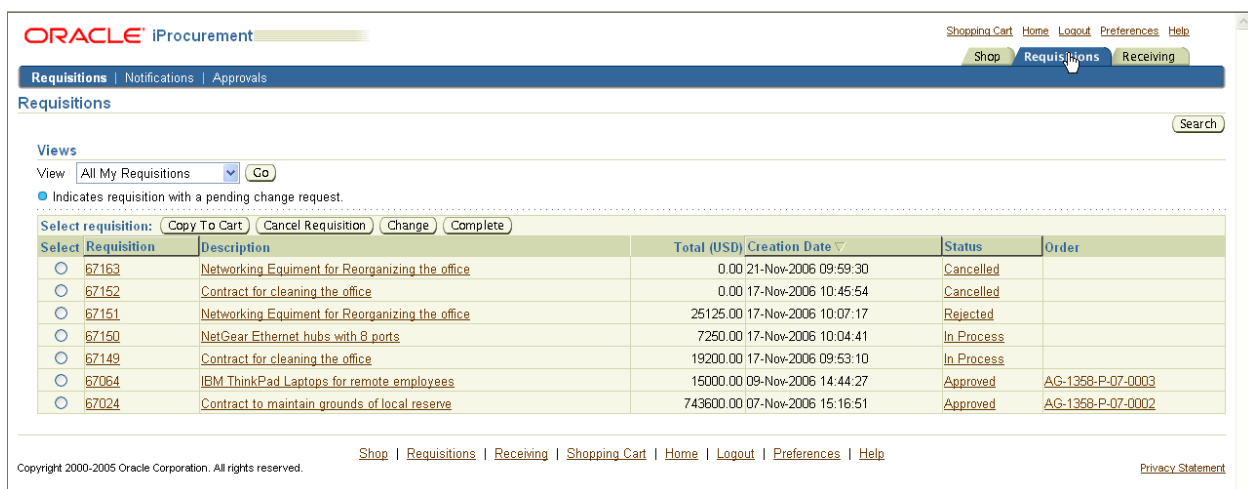
Copyright 2000-2005 Oracle Corporation. All rights reserved.

Privacy Statement

From here, continue through the checkout process normally. If you need further information, review the **Create a Simple Requisition | Stage 5 - Checkout** section (page 41) to go through the checkout process without making additional changes. If you would like to make additional changes to the accounting or the Approval Chain, refer to the **Create a Complex Requisition | Stage 5 - Checkout** section (page 55) for additional information.

Post-Order Number Changes

To begin the change Requisition process after the Requisition has been awarded, view the Requisition using the normal access process. In this example, the Requisition is selected from the *Requisition* screen.



ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Requisitions

Views

View: All My Requisitions (Go)

Indicates requisition with a pending change request.

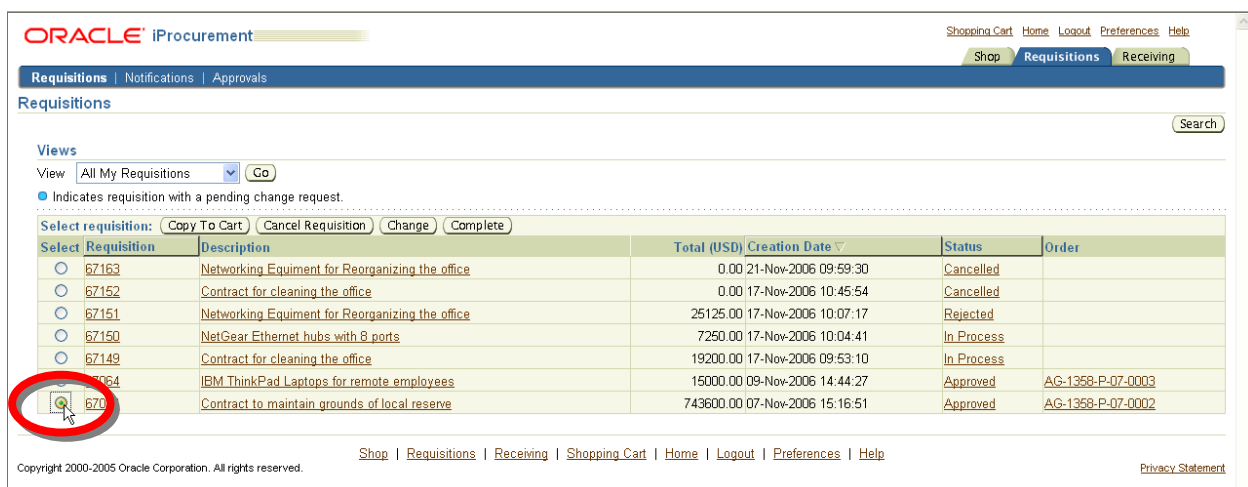
Select requisition: Copy To Cart Cancel Requisition Change Complete

Select	Requisition	Description	Total (USD)	Creation Date	Status	Order
<input type="radio"/>	67163	Networking Equipment for Reorganizing the office	0.00	21-Nov-2006 09:59:30	Cancelled	
<input type="radio"/>	67152	Contract for cleaning the office	0.00	17-Nov-2006 10:45:54	Cancelled	
<input type="radio"/>	67151	Networking Equipment for Reorganizing the office	25125.00	17-Nov-2006 10:07:17	Rejected	
<input type="radio"/>	67150	NetGear Ethernet hubs with 8 ports	7250.00	17-Nov-2006 10:04:41	In Process	
<input type="radio"/>	67149	Contract for cleaning the office	19200.00	17-Nov-2006 09:53:10	In Process	
<input type="radio"/>	67064	IBM ThinkPad Laptops for remote employees	15000.00	09-Nov-2006 14:44:27	Approved	AG-1358-P-07-0003
<input type="radio"/>	67024	Contract to maintain grounds of local reserve	743600.00	07-Nov-2006 15:16:51	Approved	AG-1358-P-07-0002

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Click on the **Select Radio button** in the *Select* column next to the Requisition that needs to be changed. In the example below, the Requisition is number 67024. When the radio button is filled in, click on the **Change** button.



ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Requisitions

Views

View: All My Requisitions (Go)

Indicates requisition with a pending change request.

Select requisition: Copy To Cart Cancel Requisition Change Complete

Select	Requisition	Description	Total (USD)	Creation Date	Status	Order
<input type="radio"/>	67163	Networking Equipment for Reorganizing the office	0.00	21-Nov-2006 09:59:30	Cancelled	
<input type="radio"/>	67152	Contract for cleaning the office	0.00	17-Nov-2006 10:45:54	Cancelled	
<input type="radio"/>	67151	Networking Equipment for Reorganizing the office	25125.00	17-Nov-2006 10:07:17	Rejected	
<input type="radio"/>	67150	NetGear Ethernet hubs with 8 ports	7250.00	17-Nov-2006 10:04:41	In Process	
<input type="radio"/>	67149	Contract for cleaning the office	19200.00	17-Nov-2006 09:53:10	In Process	
<input type="radio"/>	67064	IBM ThinkPad Laptops for remote employees	15000.00	09-Nov-2006 14:44:27	Approved	AG-1358-P-07-0003
<input checked="" type="radio"/>	67024	Contract to maintain grounds of local reserve	743600.00	07-Nov-2006 15:16:51	Approved	AG-1358-P-07-0002

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

This will start the Change Order process. There are three steps to the Change Order process: (1) Enter Changes, (2) Select Approvers and (3) Review and Submit.

The first step, Enter Changes, will take you to the *Change Order: Select Lines* page.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Enter Changes Select Approvers Review and Submit

Change Order 67024 (743600.00 USD): Select Lines

For lines with multiple distributions, click on the Quantity link to change quantities or click on the Amount link to change amount.

Cancel Step 1 of 3 Next

ⓘ Indicates cancelled line
 ⓘ Indicates a line where requisition information differs from order information. Click the icon to view the differences.
 ⓘ Indicates line has been modified by a buyer

Line	Description	Order Type	Order	Need-By	Unit	Quantity	Price	Amount (USD)	Cancel Line	Reason
1	Contract to maintain grounds of local reserve	Purchase	AG-1358-P-07-0002	08-Jan-2007 00:00:00	DOLLAR US	185775	1 USD	185775.00	<input type="checkbox"/>	
2	Contract to manage security for the reserve area	Purchase	AG-1358-P-07-0002	08-Jan-2007 00:00:00	DOLLAR US	557825	1 USD	557825.00	<input type="checkbox"/>	

ⓘ TIP Note that not all lines may be eligible for changes.

Cancel Step 1 of 3 Next

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Privacy Statement

Note: The progress bar at the top of the page indicates the current step in the Change Order process.

Several changes can be made on this page. A Requisitioner can change the *Need-By Date* or update the quantities. Only a Budget Approver has the authority to cancel a line or the entire Requisition.

Tip! Notice that in this example, the Quantity for the first line is a link instead of a text box. The link allows you to see more details about that line, and edit the amounts for each accounting line.

Tip! When you are changing quantities for multiple account codes, enter the Reason first, and then make the quantity changes.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Enter Changes Select Approvers Review and Submit

Change Requisition: Enter Quantity Changes

Cancel OK

Requisition 67024
 Line 1
 Description Contract to maintain grounds of local reserve

Distributions

Distribution	Quantity	Charge Account	Amount (USD)	Percent
1	83598.75	30.07 ZZ ZZZZZZ ZZZZZZ ZZ ZZZZZZ ZZ 700000000.0210 ZZ ZZZZZZ ZZZZ	83598.75	45.00000
2	102176.25	30.07 ZZ ZZZZZZ ZZZZZZ ZZ ZZZZZZ ZZ 702104000.0210 ZZ ZZZZZZ ZZZZ	102176.25	55.00000

Cancel OK

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

In this example, the line for security of the reserve area is the only one that needs to be edited. Change the *Quantity* appropriately, then enter a reason for the changes.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Enter Changes Select Approvers Review and Submit

Change Order 67024 (743600.00 USD): Select Lines

For lines with multiple distributions, click on the Quantity link to change quantities or click on the Amount link to change amount.

Cancel Step 1 of 3 Next

Indicates cancelled line
Indicates a line where requisition information differs from order information. Click the icon to view the differences.
Indicates line has been modified by a buyer

Line	Description	Order Type	Order	Need-By	Unit	Quantity	Price	Amount (USD)	Cancel Line	Reason
1	Contract to maintain grounds of local reserve	Purchase	AG-1358-P-07-0002	08-Jan-2007 00:00:00	DOLLAR US	185775	1 USD	185775.00	<input type="checkbox"/>	
2	Contract to manage security for the reserve area	Purchase	AG-1358-P-07-0002	08-Jan-2007 00:00:00	DOLLAR US	625950	1 USD	557825.00	<input type="checkbox"/>	Need to include additional costs

TIP Note that not all lines may be eligible for changes.

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Privacy Statement

Once all of the necessary changes have been made, click on the **Next** button to continue.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Enter Changes Select Approvers Review and Submit

Change Order 67024 (743600.00 USD): Select Lines

For lines with multiple distributions, click on the Quantity link to change quantities or click on the Amount link to change amount.

Cancel Step 1 of 3 Next

Indicates cancelled line
Indicates a line where requisition information differs from order information. Click the icon to view the differences.
Indicates line has been modified by a buyer

Line	Description	Order Type	Order	Need-By	Unit	Quantity	Price	Amount (USD)	Cancel Line	Reason
1	Contract to maintain grounds of local reserve	Purchase	AG-1358-P-07-0002	08-Jan-2007 00:00:00	DOLLAR US	185775	1 USD	185775.00	<input type="checkbox"/>	
2	Contract to manage security for the reserve area	Purchase	AG-1358-P-07-0002	08-Jan-2007 00:00:00	DOLLAR US	625950	1 USD	557825.00	<input type="checkbox"/>	Need to include additional costs

TIP Note that not all lines may be eligible for changes.

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Privacy Statement

This will take you to Step 2 – Select Approvers.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Enter Changes Select Approvers Review and Submit

Change Order: Select Approvers

Your changes will be sent to the following list of approvers.

Cancel Back Step 2 of 3 Next

Change First Approver

Approver Name	Delete
MANAGER, SUSAN	<input type="checkbox"/>
MANAGER, CHARLIE	<input type="checkbox"/>

Add Approver

Note to Approver

Cancel Back Step 2 of 3 Next

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Privacy Statement

On the *Change Order: Select Approvers* page, change the Approval Change as necessary. If you need to review how to adjust an approval history, refer to the **Create a Complex Requisition | Stage 5 - Checkout** section (page 55) for additional information.

To continue, click on the **Next** button to go to Step 3 – Review and Submit.

ORACLE iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Shop](#) [Requisitions](#) [Receiving](#)

[Requisitions](#) | [Notifications](#) | [Approvals](#)

Enter Changes | Select Approvers | **Review and Submit**

Change Order 67024: Review and Submit

Request Created By: REQUISITIONER, DAVE
 Request Creation Date: 28-Nov-2006 10:36:58
 Old Requisition Total: 743600.00 USD
 New Requisition Total: 811725.00 USD

Old Total Estimated Tax: 0.00 USD
 New Total Estimated Tax: 0.00 USD
 Note to Approver

[Cancel](#) [Back](#) **Step 3 of 3** [Submit \(Only Funds Officers can cancel Approved or Pre-Approved requisitions\)](#)

Change Requisition Details

⚙ Indicates cancelled line
 ✨ Indicates new value
 ■ Indicates line has been modified by a buyer

Details	Line	Description	Order Type	Order	Need-By	Unit	Quantity	Price	Amount (USD)	Taxable	Estimated Tax (USD)	Recoverable Tax (USD)	Cancel Line	Reason
Show	1	Contract to maintain grounds of local reserve	Purchase	AG-1358-P-07-0002	08-Jan-2007 00:00:00	DOLLAR US	185775	1 USD	185775.00	No	0.00	0.00		
Show	2	Contract to manage security for the reserve area	Purchase	AG-1358-P-07-0002	08-Jan-2007 00:00:00	DOLLAR US	557825 625950 ✨	1 USD	557825.00 625950.00 ✨	No	0.00	0.00		Need to include additional costs

[Cancel](#) [Back](#) **Step 3 of 3** [Submit \(Only Funds Officers can cancel Approved or Pre-Approved requisitions\)](#)

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved. [Privacy Statement](#)

In Step 3, review the changes that have been made to the Requisition. On this page, the user has several options:

- If the changes no longer need to be made, click on the **Cancel** button to erase all the changes made.
- If further changes need to be made, click on the **Back** button next to the *Cancel* button to return to the previous step.
- To view the details about each line item, click on the **Show** link in the *Details* column for more information.
- To finalize the changes and submit the Requisition for approval, click on the **Submit (Only Funds Officers can cancel Approved or Pre-Approved requisitions)**.

In this example, the Requisition is submitted for approval. Once the submission is complete, IAS sends the user to a confirmation screen.

ORACLE iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Shop](#) [Requisitions](#) [Receiving](#)

[Requisitions](#) | [Notifications](#) | [Approvals](#)

Confirmation

Your change request(s) for Requisition 67024 have been submitted for processing. View status of the change request(s) from the Requisition Status page.

Change Order 67024: Confirmation Details

Request Created By: REQUISITIONER, DAVE
 Request Creation Date: 28-Nov-2006 10:36:58
 Old Requisition Total: 743600.00 USD
 New Requisition Total: 811725.00 USD

Old Total Estimated Tax: 0.00 USD
 New Total Estimated Tax: 0.00 USD
 Note to Approver

Change Requisition Details

⚙ Indicates cancelled line
 ✨ Indicates new value
 ■ Indicates line has been modified by a buyer

Details	Line	Description	Order Type	Order	Need-By	Unit	Quantity	Price	Amount (USD)	Taxable	Estimated Tax (USD)	Recoverable Tax (USD)	Cancel Line	Reason
Show	1	Contract to maintain grounds of local reserve	Purchase	AG-1358-P-07-0002	08-Jan-2007 00:00:00	DOLLAR US	185775	1 USD	185775.00	No	0.00	0.00		
Show	2	Contract to manage security for the reserve area	Purchase	AG-1358-P-07-0002	08-Jan-2007 00:00:00	DOLLAR US	557825 625950 ✨	1 USD	557825.00 625950.00 ✨	No	0.00	0.00		Need to include additional costs

[Return to Requisition Details](#)

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved. [Privacy Statement](#)

Please note that if you need to update the account information or add a new line item, the proper procedure to follow is to first contact the Contracting Officer to cancel the appropriate line, then copy the requisition to the cart to retrieve the information for that line. Delete the extra line items from the original Requisition, then continue through the checkout process and update the accounting as appropriate. Finally, submit the Requisition for approval. Once you have submitted the new Requisition with the new information, go back to the original Requisition and cancel the original line item. Once the Requisition is approved by the Approvers and FFIS, the Contracting Officer can create a new line on the same award based on the new Requisition you just submitted.

Note: It is recommended that you copy the Requisition to the cart before you cancel out the line. When you cancel out the line item, the information for that line will not be entered into the new Requisition when you copy it to the cart.

Warning! A common misconception regarding canceling Requisitions is that an award can be disassociated from a Requisition. Although PRISM provides the functionality to disassociate an award, it **does not** update Oracle and therefore **does not** update FFIS. An award **cannot** be disassociated from a requisition under any circumstances. The **only** way to update FFIS is to cancel the award.

Tip! This is a complex process. If you need more detailed instructions, please contact the IAS Help Desk.

Canceling Requisitions

In this section, we will learn how a Requisitioner, can cancel a Requisition. A Requisitioner can only cancel a Requisition if the funds have not been committed by a Budget Approver. After commitment of funds, only a Budget Approver has FFIS authority to cancel a Requisition.

Warning! Only Funds Officers can cancel Approved or Pre-Approved Requisitions.

This example demonstrates the steps involved in canceling a Requisition that has been submitted but is still in the pre-award status. To begin canceling your Requisition, navigate to the *Shop* page.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Stores | Categories | Shopping Lists | Non-Catalog Request

Search Exchange Oracle.com Go Advanced Search

Stores

Main Store
Main Store Exchange Oracle.com

My Requisitions (Full List)

Requisition	Description	Total (USD)	Status	Copy	Change	Receive
67131	computer monitors	29559.80	Incomplete			
67130	computer monitors	9759.80	In Process			
67063	laptop	6123.81	Incomplete			
67025	Office Chairs	12500.00	Approved			

My Notifications (Full List)

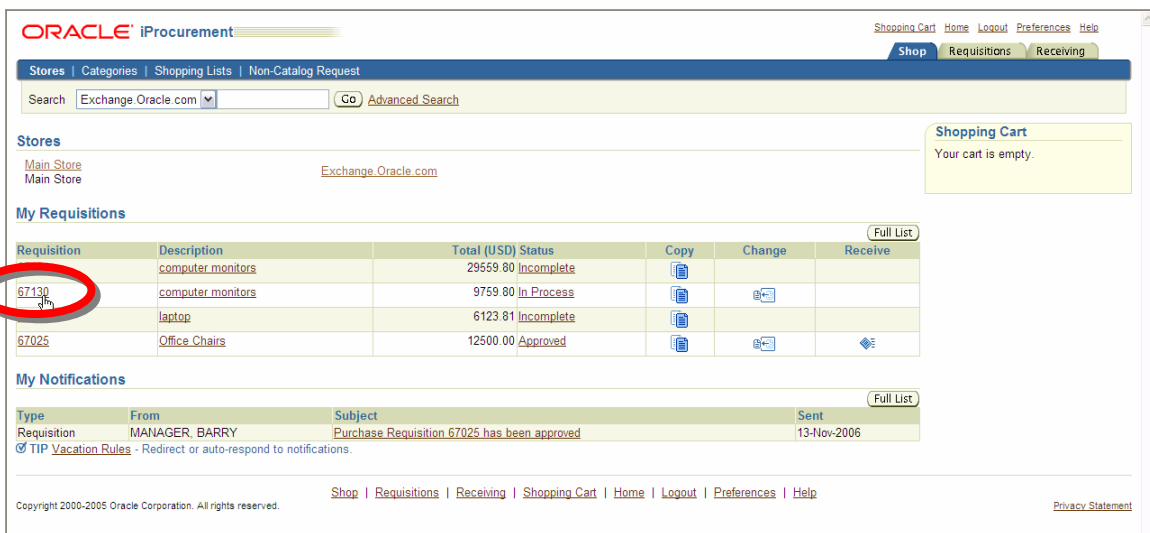
Type	From	Subject	Sent
Requisition	MANAGER, BARRY	Purchase Requisition 67025 has been approved	13-Nov-2006

TIP Vacation Rules - Redirect or auto-respond to notifications.

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Locate the Requisition you want to cancel under the *My Requisitions* section, and select the corresponding Requisition number.



ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Stores | Categories | Shopping Lists | Non-Catalog Request

Search Exchange Oracle.com Go Advanced Search

Stores

Main Store Exchange Oracle.com

My Requisitions

Requisition	Description	Total (USD)	Status	Copy	Change	Receive
67130	computer monitors	29559.80	Incomplete			
	computer monitors	9759.80	In Process			
	laptop	6123.81	Incomplete			
67025	Office Chairs	12500.00	Approved			

My Notifications

Type	From	Subject	Sent
Requisition	MANAGER, BARRY	Purchase Requisition 67025 has been approved	13-Nov-2006

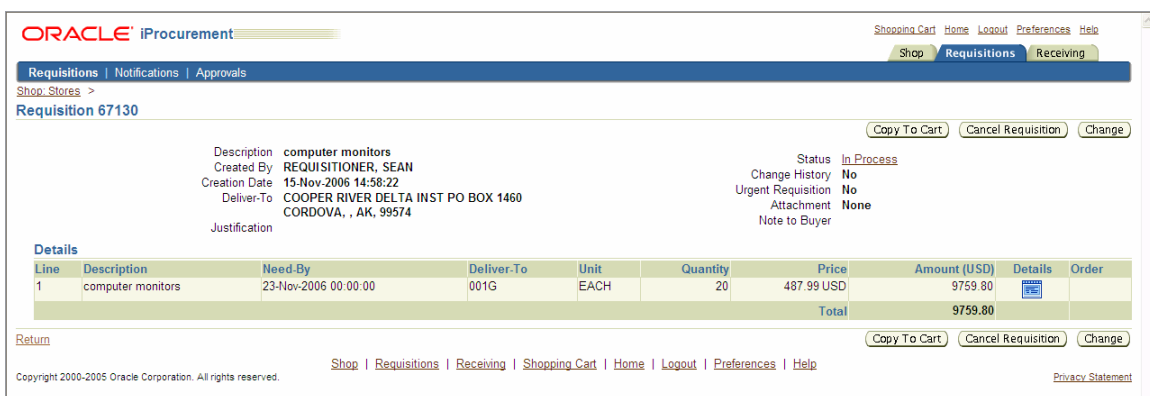
TIP Vacation Rules - Redirect or auto-respond to notifications.

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Remember! If you don't see the Requisition you are looking for displayed, use the **Full List** button feature to located your Requisition.

This will take you to a page which displays details for your Requisition.



ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Shop Stores >

Requisition 67130

Copy To Cart Cancel Requisition Change

Description computer monitors Status In Process

Created By REQUISITIONER, SEAN Change History No

Creation Date 15-Nov-2006 14:58:22 Urgent Requisition No

Deliver-To COOPER RIVER DELTA INST PO BOX 1460 Attachment None

CORDOVA, AK, 99574 Note to Buyer

Justification

Details


Line	Description	Need By	Deliver-To	Unit	Quantity	Price	Amount (USD)	Details	Order
1	computer monitors	23-Nov-2006 00:00:00	001G	EACH	20	487.99 USD	9759.80		
Total							9759.80		

Return

Copy To Cart Cancel Requisition Change

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Remember! If you want to view further details for your Requisition, select the **Details** icon, .

Once you have finished reviewing the details and verifying you selected the correct Requisition to cancel, click on the **Cancel Requisition** button.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Shop Stores >

Requestion 67130

Copy To Cart Cancel Requisition Change

Description computer monitors
 Created By REQUISITIONER, SEAN
 Creation Date 15-Nov-2006 14:58:22
 Deliver-To COOPER RIVER DELTA INST PO BOX 1460
 CORDOVA, AK, 99574
 Justification

Status In Process
 Change History No
 Urgent Requisition No
 Attachment None
 Note to Buyer

Details

Line	Description	Need-By	Deliver-To	Unit	Quantity	Price	Amount (USD)	Details	Order
1	computer monitors	23-Nov-2006 00:00:00	001G	EACH	20	487.99 USD	9759.80		
Total							9759.80		

Return

Copy To Cart Cancel Requisition Change

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Privacy Statement

This will take you to the *Cancel Requisition: Select Lines* page.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Cancel Requisition 67130 (9759.80 USD): Select Lines

Return to Requisition Cancel Entire Requisition (Only Funds Officers can cancel Approved or Pre-Approved requisitions) Continue

Indicates cancelled line
 Indicates line has been modified by a buyer

Details

Line	Description	Order Type	Order	Need-By	Unit	Quantity	Price	Amount (USD)	Select
1	computer monitors	Purchase		23-Nov-2006 00:00:00	EACH	20	487.99 USD	9759.80	<input type="checkbox"/>

Return to Requisition Cancel Entire Requisition (Only Funds Officers can cancel Approved or Pre-Approved requisitions) Continue

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Privacy Statement

Tip! If you want to see charge account information for a line item in your Requisition, click the **Show** button to display it.

Details	Line	Description	Order Type	Order	Need-By	Unit	Quantity	Price	Amount (USD)	Select
Hide	1	computer monitors	Purchase		23-Nov-2006 00:00:00	EACH	20	487.99 USD	9759.80	<input type="checkbox"/>

Distributions								Amount (USD)	Percent
Distribution	Quantity	Charge	Account						
1	20	30.07	ZZ ZZZZZZ ZZ ZZZZZZ ZZ ZZZZZZ ZZ 700000000 0210 ZZ ZZZZZZZZ ZZZZ					9759.80	100.00000

On the *Cancel Requisitions: Select Lines* page, you can select the individual lines that you want to cancel by checking the box in the *Select* column. If you had a Requisition with multiple line items, and you decided to cancel the entire Requisition, you can select the **Cancel Entire Requisition** button.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Cancel Requisition 67130 (9759.80 USD): Select Lines

Return to Requisition Cancel Entire Requisition (Only Funds Officers can cancel Approved or Pre-Approved requisitions) Continue

Indicates cancelled line
 Indicates line has been modified by a buyer

Details

Line	Description	Order Type	Order	Need-By	Unit	Quantity	Price	Amount (USD)	Select
1	computer monitors	Purchase		23-Nov-2006 00:00:00	EACH	20	487.99 USD	9759.80	<input checked="" type="checkbox"/>

Return to Requisition Cancel Entire Requisition (Only Funds Officers can cancel Approved or Pre-Approved requisitions) Continue

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Privacy Statement

After selecting which items to cancel, click the **Continue** button.

iProcurement

[Shopping Cart](#)
[Home](#)
[Logout](#)
[Preferences](#)
[Help](#)

[Shop](#)
[Requisitions](#)
[Receiving](#)

[Requisitions](#)
[Notifications](#)
[Approvals](#)

Cancel Requisition 67130 (9759.80 USD): Select Lines

↶ Indicates cancelled line
■ Indicates line has been modified by a buyer

[Return to Requisition](#)
[Cancel Entire Requisition \(Only Funds Officers can cancel Approved or Pre-Approved requisitions\)](#)
[Continue](#)

Details Line	Description	Order Type	Order	Need-By	Unit	Quantity	Price	Amount (USD)	Select
▼ Hide 1	computer monitors	Purchase		23-Nov-2006 00:00:00	EACH	20	487.99 USD	9759.80	<input checked="" type="checkbox"/>

Distributions

Distribution	Quantity	Charge Account	Amount (USD)	Percent
1	20	30.07 ZZ ZZZZZZZ ZZZZZZZZ ZZ 700000000 0210 ZZ ZZZZZZZZ ZZZZ	9759.80	100.00000

[Return to Requisition](#)
[Cancel Entire Requisition \(Only Funds Officers can cancel Approved or Pre-Approved requisitions\)](#)
[Continue](#)

[Shop](#)
[Requisitions](#)
[Receiving](#)
[Shopping Cart](#)
[Home](#)
[Logout](#)
[Preferences](#)
[Help](#)

You should now see the *Cancel Requisition: Review and Submit* page.

[Shopping Cart](#)
[Home](#)
[Logout](#)
[Preferences](#)
[Help](#)

[Shop](#)
[Requisitions](#)
[Receiving](#)

[Requisitions](#)
[Notifications](#)
[Approvals](#)

Cancel Requisition 67130: Review and Submit

Return to Requisition

Back

Submit (Only Funds Officers can cancel Approved or Pre-Approved requisitions)

Request Created By

REQUISITIONER, SEAN

Old Requisition Total

9759.80 USD

New Requisition Total

0.00 USD

Request Creation Date

27-Nov-2006 09:09:49

Old Total Estimated Tax

0.00 USD

New Total Estimated Tax

0.00 USD

Cancel Requisition Details

Indicates cancelled line

Indicates line has been modified by a buyer

Details	Line	Description	Order Type	Order Need-By	Unit	Quantity	Price Amount (USD)	Cancel Line
▶ Show 1		computer monitors Purchase		23-Nov-2006 00:00:00	EACH	20	487.99 USD	9759.80 Yes

Return to Requisition

Back

Submit (Only Funds Officers can cancel Approved or Pre-Approved requisitions)

Shop

Requisitions

Receiving

Shopping Cart

Home



Logout

Preferences

Help

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Privacy Statement

Note: The Cancel Requisition Details section gives detail about two icons that will be displayed next to line items that have been canceled, , or line items that have been modified by a buyer, .

Cancel Requisition Details

- ⊖ Indicates cancelled line
- Indicates line has been modified by a buyer

On this page, please review and make sure that all appropriate line items have been selected for cancellation. There is a *Cancel Line* column that will give a "Yes" or "No" response to the cancellation of that line.

Details	Line	Description	Order Type	Order	Need-By	Unit	Quantity	Price	Amount (USD)	Cancel Line
Show	1	computer monitors	Purchase		23-Nov-2006 00:00:00	EACH	20	487.99 USD	9759.80	Yes

If you want to make further changes before canceling your Requisition, select the **Back** button. If you are satisfied with your cancellation, click the **Submit** button.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Cancel Requisition 67130: Review and Submit

Request Created By: REQUISITIONER, SEAN
 Old Requisition Total: 9759.80 USD
 New Requisition Total: 0.00 USD

Request Creation Date: 27-Nov-2006 09:09:49
 Old Total Estimated Tax: 0.00 USD
 New Total Estimated Tax: 0.00 USD

[Return to Requisition](#) [Back](#) [Submit \(Only Funds Officers can cancel Approved or Pre-Approved requisitions\)](#)

Cancel Requisition Details

Indicates cancelled line
 Indicates line has been modified by a buyer

Details	Line	Description	Order Type	Order Need-By	Unit	Quantity	Price Amount (USD)	Cancel Line
Show 1	1	computer monitors Purchase		23-Nov-2006 00:00:00	EACH	20 487.99	USD 9759.80	Yes

[Return to Requisition](#) [Submit \(Only Funds Officers can cancel Approved or Pre-Approved requisitions\)](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Privacy Statement

Remember! Cancellations of Requisitions that have been sent to FFIS can not be initiated by a Requisitioner. If a Requisitioner attempts to cancel these Requisitions, it will result in a Document Resolution Message from FFIS.

After submission, the *Cancel Requisition: Confirmation Details* page will display on your screen. You will receive a confirmation message at the top of this page.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Confirmation

Your cancellation request(s) for Requisition 67130 have been submitted for processing. View status of the cancellation request(s) from the Requisition Status page.

Cancel Requisition 67130: Confirmation Details

Request Created By: REQUISITIONER, SEAN
 Old Requisition Total: 9759.80 USD
 New Requisition Total: 0.00 USD

Request Creation Date: 27-Nov-2006 09:09:49
 Old Total Estimated Tax: 0.00 USD
 New Total Estimated Tax: 0.00 USD

Cancel Requisition Details

Indicates cancelled line
 Indicates line has been modified by a buyer

Details	Line	Description	Order Type	Order Need-By	Unit	Quantity	Price Amount (USD)	Cancel Line
Show 1	1	computer monitors Purchase		23-Nov-2006 00:00:00	EACH	20 487.99	USD 9759.80	Yes

[Return to Requisition Details](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Privacy Statement

Requisition Approval

Introduction

In the previous topic, you learned about how work with Requisitions from the Requisitioner's point of view. In this topic, the Requisition approval process will be covered.

Objectives

In this topic you will learn how to:

- Approve a Requisition as a Management Approver
- Approve a Requisition as a Budget (Funds) Approver
 - Reviewing the Requisition Details
 - How to Respond to Requisition Approvals and Change the Requisition
 - Edit the Requisition as the Approver
- Cancel Requisitions
 - Business Process Guidelines
 - Cancel Requisition Process in IAS
- Manage Notifications
 - Reassign Notification During Absence

Management Approval

The function of a Management Approver, also called Requisition Approver, in IAS is to review Requisitions as submitted by a Requisitioner for technical, property, or management approval. In addition, they may ensure all purchase requests are necessary. In this section, you will learn how to process a basic approval of a Requisition, with no adjustments or additions. In the next section, Requisition approval with changes will be covered.

When a Management Approver logs into IAS, the *Shop* page will be displayed on your screen. In the *My Notifications* section, a portion of your Requisitions will be displayed.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Stores | Categories | Shopping Lists | Non-Catalog Request

Search [Advanced Search](#)

Stores

Main Store [Exchange Oracle.com](#)

My Requisitions

Requisition	Description	Total (USD)	Status	Copy	Change	Receive
No data exists.						

My Notifications

Type	From	Subject	Sent
Requisition	REQUISITIONER, SEAN	Purchase Requisition 67025 for REQUISITIONER, SEAN (12500.00 USD)	09-Nov-2006

[TIP Vacation Rules](#) - Redirect or auto-respond to notifications.

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. [Privacy Statement](#)

The *My Notifications* section of the *Shop* page is similar to the *To Do List* in the previous version of IAS.

REMEMBER: The *My Notifications* section of the *Shop* page may not display the entire list of all Requisitions awaiting approval.

To review the entire list of Requisitions pending approval, click the **Full List** button. This will take you to the *Worklist* page under the *Requisitions* tab.

The Worklist Page

The *Worklist* page allows you to view and sort all *Notifications*.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Shop Stores > Notification Details > Request Information > Notification Details > Worklist

View

Select Subject	Sent	Due - Fn Level	From	Type
There are no notifications in this view.				

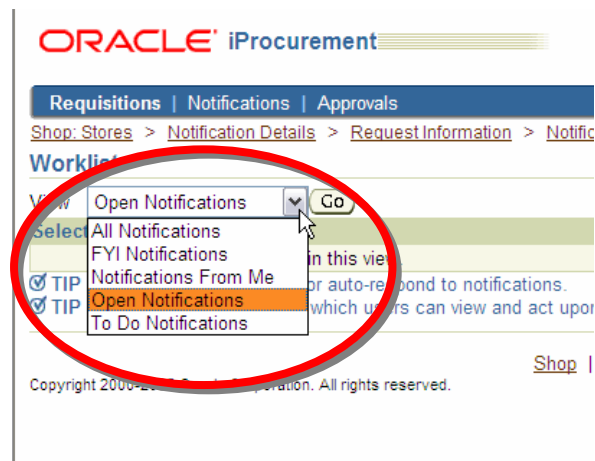
[TIP Vacation Rules](#) - Redirect or auto-respond to notifications.

[TIP Worklist Access](#) - Specify which users can view and act upon your notifications.

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. [Privacy Statement](#)

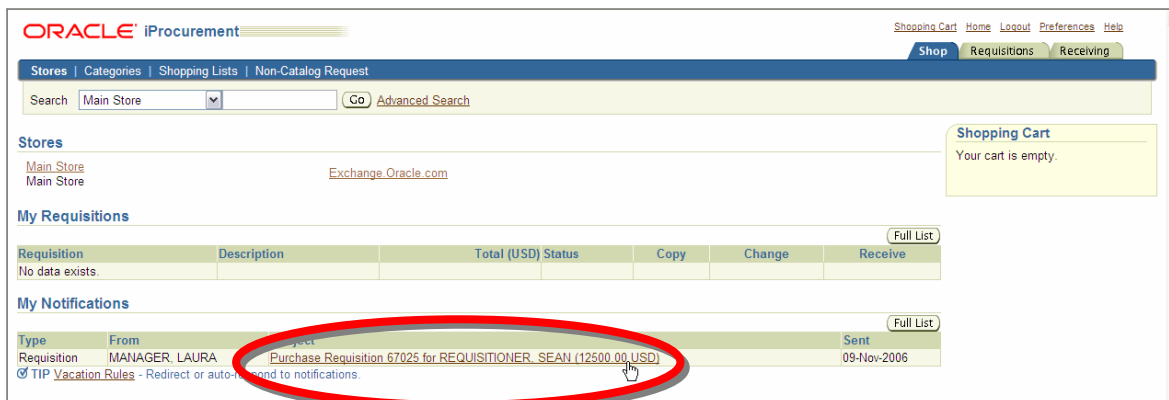
The *View* dropdown menu allows you to view *All Notifications*, *FYI Notifications*, *Notifications from Me*, *Open Notifications*, and *To Do Notifications*.



From the *Worklist* page, you can also create rules to redirect or auto-respond to your Notifications using the *Vacation Rules* link. In addition, you can specify which users can view and act upon your Notifications using the *Worklist Access* link.

- ✓ TIP [Vacation Rules](#) - Redirect or auto-respond to notifications.
- ✓ TIP [Worklist Access](#) - Specify which users can view and act upon your notifications.

Now that the *Worklist* page has been reviewed, let's continue the Requisition Approval process. From the *Shop* page in the *My Notifications* section, select the Requisition to be approved.



You should see the *Purchase Requisition* page for the Requisition selected for approval. To ensure you are on the correct page, look at the Title Bar which should include the Requisition number, the name of the original Requisitioner, and the total amount of the Requisition. In the case of our selection, the Requisition number is 67025, the Requisitioner's name is Sean Requisitioner, and the amount of the Requisition is \$12,500.

ORACLE[®] iProcurement

Shopping Cart | Home | Logout | Preferences | Help

Shop | Requisitions | Receiving

Requisitions | Notifications | Approvals

Shop: Stores >

Purchase Requisition 67025 for REQUISITIONER, SEAN (12500.00 USD)

From: MANAGER, LAURA
To: MANAGER, BARRY
Sent: 09-Nov-2006 11:56:44
ID: 307778

Description: Office Chairs
Requisition Total: 12500.00 USD
Estimated Tax: 0.00 USD

Approve | Approve And Forward | Forward | Reject | Reassign | Request Information

Requisition Lines

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	Office Chairs	- 108307698	30	EACH	50	250	12500.00

Approval Sequence

Num	Name	Action	Action Date	Note
1	REQUISITIONER, SEAN	Submitted	09-Nov-2006 10:26:13	
2	REQUISITIONER, SEAN	Forwarded	09-Nov-2006 10:26:14	
3	MANAGER, LAURA	Approved	09-Nov-2006 11:56:40	
4	MANAGER, BARRY	Pending		

Related Applications

[Edit Requisition](#)
[View Requisition Details](#)

Response

Forward To: All Employees and Users
Note:

Return to Worklist

Approve | Approve And Forward | Forward | Reject | Reassign | Request Information

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Privacy Statement

On this page, you will see general information about the selected Requisition in the *Requisition Lines* section including Line Items, Quantity, Price, Cost Center, Supplier and Amount.

Requisition Lines

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	Office Chairs	- 108307698	30	EACH	50	250	12500.00

You will also see the *Approval Sequence* of the Requisition up through this point in time, including your name and the pending status of the Requisition. In our example, the login *Name* is Barry Manager and the *Action* status is *Pending*. This *Pending* status indicates that the Requisition is currently in the care of Barry Manager for approval.

Approval Sequence

Num	Name	Action	Action Date	Note
1	REQUISITIONER, SEAN	Submitted	09-Nov-2006 10:26:13	
2	REQUISITIONER, SEAN	Forwarded	09-Nov-2006 10:26:14	
3	MANAGER, LAURA	Approved	09-Nov-2006 11:56:40	
4	MANAGER, BARRY	Pending		

The *Related Applications* section of the *Purchase Requisition* page allows you to edit this Requisition using the **Edit Requisition** link. More detail will be provided about editing a Requisition in the next section.

Related Applications

- [Edit Requisition](#)
- [View Requisition Details](#)

The *Related Applications* section of the *Purchase Requisition* page allows you to review the details of a Requisition using the **View Requisition Details** link. Click on this link now to review the details of your Requisition.

ORACLE[®] iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Shop Stores > Notification Details >

Requisition 67025

Description Office Chairs
 Created By REQUISITIONER, SEAN
 Creation Date 07-Nov-2006 15:37:25
 Deliver-To USDA RURAL DEVELOPMENT 230 N. 1ST AVE,
 SUITE 206 PHOENIX, , AZ, 85003
 Justification

Status In Process
 Change History No
 Urgent Requisition No
 Attachment None
 Note to Buyer


Details

Line	Description	Need-By	Deliver-To	Unit	Quantity	Price	Amount (USD)	Details	Order
1	Office Chairs	09-Dec-2006 00:00:00	RD-AZ-9417	EACH	50	250 USD	12500.00		
Total							12500.00		

Return

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Now, you will see a new page in your window displaying the general details of your Requisition. To see further details about Line Items in your Requisition, click the **Details** icon, , in the *Details* column of the page.

ORACLE[®] iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Shop Stores > Notification Details >

Requisition 67025

Description Office Chairs
 Created By REQUISITIONER, SEAN
 Creation Date 07-Nov-2006 15:37:25
 Deliver-To USDA RURAL DEVELOPMENT 230 N. 1ST AVE,
 SUITE 206 PHOENIX, , AZ, 85003
 Justification

Status In Process
 Change History No
 Urgent Requisition No
 Attachment None
 Note to Buyer

Details

Line	Description	Need-By	Deliver-To	Unit	Quantity	Price	Amount (USD)	Details	Order
1	Office Chairs	09-Dec-2006 00:00:00	RD-AZ-9417	EACH	50	250 USD	12500.00		
Total							12500.00		

Return

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

You should see a page displaying further details for that line item.

ORACLE[®] iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Shop Stores > Notification Details > Requisition 67025 >

Requisition 67025 Line 1: Details

Requisition

Description Office Chairs
 Status In Process
 Change History No
 Current Approver MANAGER, BARRY
 Approver Phone
 Date Sent to Approver 09-Nov-2006

[Show Additional Information](#)

Order

No data exists.

Shipment

Shipment	Shipment Date	Expected Receipt Date	Freight Carrier	Tracking Number	Track Shipment
No data exists.					

Receipt

Receipt	Transaction Date	Received Unit	Received By	Received by Phone	Items Returned
No data exists.					

Return

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Tip! To see a third level of details, click the **Show Additional Information** link located in the *Requisition* section of this page.

ORACLE[®] iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Shop](#) [Requisitions](#) [Receiving](#)

[Requisitions](#) | [Notifications](#) | [Approvals](#)

[Shop: Stores](#) > [Notification Details](#) > [Request Information](#) > [Notification Details](#) > [Requisition 67025](#) >

Requisition 67025 Line 1: Details OK

Requisition

Description	Office Chairs	Current Approver	MANAGER LAURA
Status	In Process	Approver Phone	
Change History	No	Date Sent to Approver	09-Nov-2006

[Hide Additional Information](#)

Item Information

Requester	REQUISITIONER, SEAN	Deliver-To Location	RD-AZ-9417
Need-By Date	09-Dec-2006 00:00:00	Destination Type	Expense
Item Number		Inventory Replenishment Request	No
Category Description	MAINT-REP OF OFFICE SUPPLIES	Supplier	- 108307698
P-Card Used	No	Supplier Site	108307698ES
Taxable	No	Supplier Contact	
		Contact Phone	
		Supplier Item	
		Transaction Code	IQ-NOCOMMIT

Charge Account

Charge Account	Project Number	Task Number	Expenditure Type	Expenditure Organization	Expenditure Item Date	Percent
30 07 ZZ ZZZZZZ ZZZZZZ ZZ ZZZZZZ ZZ 700000000 0210 ZZ ZZZZZZ ZZZZ						100

Attachment

File Name	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No data exists.								

Order

No data exists.

Shipment

Shipment	Shipment Date	Expected Receipt Date	Freight Carrier	Tracking Number	Track Shipment
No data exists.					

Receipt

Receipt	Transaction Date	Received Unit	Received By	Received by Phone	Items Returned
No data exists.					

OK

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved. [Privacy Statement](#)

Now that details for your Requisition have been reviewed, click on the **OK** button to return to the previous details screen.

ORACLE[®] iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Shop](#) [Requisitions](#) [Receiving](#)

[Requisitions](#) | [Notifications](#) | [Approvals](#)

[Shop: Stores](#) > [Notification Details](#) > [Request Information](#) > [Notification Details](#) > [Requisition 67025](#) >

Requisition 67025 Line 1: Details OK

Requisition

Description	Office Chairs	Current Approver	MANAGER BARRY
Status	In Process	Approver Phone	
Change History	No	Date Sent to Approver	09-Nov-2006

[Show Additional Information](#)

Order

No data exists.

Shipment

Shipment	Shipment Date	Expected Receipt Date	Freight Carrier	Tracking Number	Track Shipment
No data exists.					

Receipt

Receipt	Transaction Date	Received Unit	Received By	Received by Phone	Items Returned
No data exists.					

OK

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved. [Privacy Statement](#)

Select the **OK** button one additional time to return to the *Purchase Requisition* screen.

ORACLE[®] iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Shop](#) [Requisitions](#) [Receiving](#)

[Requisitions](#) | [Notifications](#) | [Approvals](#)

[Shop Stores](#) >

Purchase Requisition 67025 for REQUISITIONER, SEAN (12500.00 USD)

From: MANAGER, LAURA Description: Office Chairs
 To: MANAGER, BARRY Requisition Total: 12500.00 USD
 Sent: 09-Nov-2006 11:56:44 Estimated Tax: 0.00 USD
 ID: 307778

[Approve](#) [Approve And Forward](#) [Forward](#) [Reject](#) [Reassign](#) [Request Information](#)

Requisition Lines

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	Office Chairs	- 108307698	30	EACH	50	250	12500.00


Approval Sequence

Num	Name	Action	Action Date	Note
1	REQUISITIONER, SEAN	Submitted	09-Nov-2006 10:26:13	
2	REQUISITIONER, SEAN	Forwarded	09-Nov-2006 10:26:14	
3	MANAGER, LAURA	Approved	09-Nov-2006 11:56:40	
4	MANAGER, BARRY	Pending		

Related Applications

[Edit Requisition](#)
[View Requisition Details](#)

Response

Forward To: 

Note:

[Return to Worklist](#) [Approve](#) [Approve And Forward](#) [Forward](#) [Reject](#) [Reassign](#) [Request Information](#)

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved. [Privacy Statement](#)

On this *Purchase Requisition* page, there is also a *Response* section. If you are forwarding this document to another person, please select this person from the selection list using the following format: LAST_NAME, FIRST_NAME. Only use this when forwarding or approving and forwarding. Please leave the selection to All Employees and Users as the other option is not supported at this time.

Response

Forward To: 

Note:

The navigation area on the *Purchase Requisition* page is located along the top-right and bottom-right of the screen. It provides you, the Approver, six options: *Approve*, *Approve and Forward*, *Forward*, *Reject*, *Reassign*, and *Request Information*.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Shop: Stores >

Purchase Requisition 67025 for REQUISITIONER, SEAN (12500.00 USD)

From: MANAGER, LAURA
To: MANAGER, BARRY
Sent: 09-Nov-2006 11:56:44
ID: 307778

Description: Office Chairs
Requisition Total: 12500.00 USD
Estimated Tax: 0.00 USD

Requisition Lines

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	Office Chairs	- 108307698	30	EACH	50	250	12500.00

Approval Sequence

Num	Name	Action	Action Date	Note
1	REQUISITIONER, SEAN	Submitted	09-Nov-2006 10:26:13	
2	REQUISITIONER, SEAN	Forwarded	09-Nov-2006 10:26:14	
3	MANAGER, LAURA	Approved	09-Nov-2006 11:56:40	
4	MANAGER, BARRY	Pending		

Related Applications

[Edit Requisition](#)
[View Requisition Details](#)

Response

Forward To: All Employees and Users
Note:

[Return to Worklist](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Privacy Statement

Approve Approve And Forward Forward Reject Reassign Request Information

Approve

The **Approve** button allows you to continue with the process of approving a Requisition.

Approve and Forward

The **Approve and Forward** button is used when an Approver wants to acknowledge they approve a Requisition but also want to obtain the approval of another party. For example, in the case of an IT purchase when approval is also needed from the IT department.

Forward

The **Forward** button allows you to forward a Requisition to another Approver for approval and review. A good example of when this is useful is when you need to forward the Requisition to another department for approval. Often times, Requisitions for technological equipment, like computers or monitors, need to be forwarded to the IT department for approval.

Tip! Do not attempt to forward a Requisition to a Contracting Officer, as the Requisition will be sent to the Acquisition Management module per pre-determined rules.

Reject

The **Reject** button allows you to reject a Requisition.

Reassign

The **Reassign** button allows you to reassign a Requisition to another party for Approval. Reassigning a Requisition takes you out of the Approval Chain and allows another user to act on your behalf.

Request Information

The **Request Information** button allows you to request additional information from the Requisitioner regarding a Requisition.

Let's continue and quickly approve your Requisition. Once you are satisfied with the Requisition and its details, select the **Approve** button on the *Purchase Requisition* screen.

ORACLE iProcurement

Shopping Cart | Home | Logout | Preferences | Help

Shop | Requisitions | Receiving

Requisitions | Notifications | Approvals

Shop: Stores > Notification Details > Request Information >

Purchase Requisition 67025 for REQUISITIONER, SEAN (12500.00 USD)

Approve | Approve And Forward | Forward | Reject | Reassign | Request Information

From: REQUISITIONER, SEAN
To: MANAGER, LAURA
Sent: 09-Nov-2006 10:26:14
ID: 307772

Description: Office Chairs
Requisition Total: 12500.00 USD
Estimated Tax: 0.00 USD

Requisition Lines

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	Office Chairs	- 108307698	30	EACH	50	250	12500.00

Approval Sequence

Num	Name	Action	Action Date	Note
1	REQUISITIONER, SEAN	Submitted	09-Nov-2006 10:26:13	
2	REQUISITIONER, SEAN	Forwarded	09-Nov-2006 10:26:14	
3	MANAGER, LAURA	Pending		
4	MANAGER, BARRY			

Related Applications

Edit Requisition
View Requisition Details

Response

Forward To: All Employees and Users

Note:

Return to Worklist

Approve | Approve And Forward | Forward | Reject | Reassign | Request Information

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Privacy Statement

You have just approved a Requisition. Doing so will take you directly to the *Worklist* page. The Worklist page is also known as the *Notifications* page.

ORACLE iProcurement

Shopping Cart | Home | Logout | Preferences | Help

Shop | Requisitions | Receiving

Requisitions | Notifications | Approvals

Shop: Stores > Notification Details > Request Information > Notification Details >

Worklist

View: Open Notifications | Go

Select Subject	Sent	Due - Fn Level	From	Type
There are no notifications in this view.				

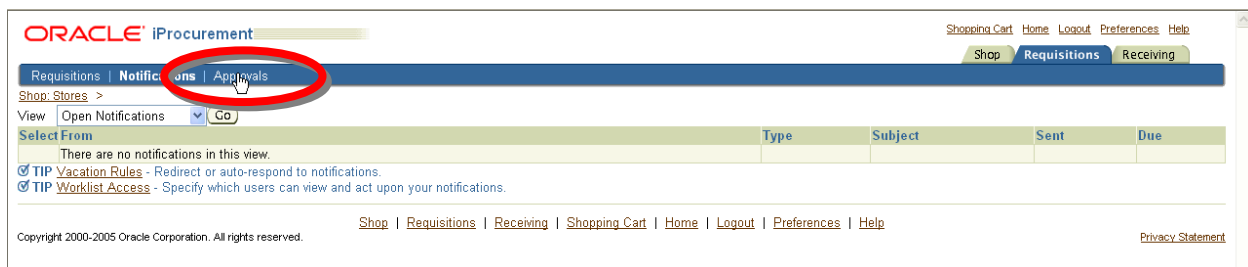
TIP Vacation Rules - Redirect or auto-respond to notifications.
TIP Worklist Access - Specify which users can view and act upon your notifications.

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

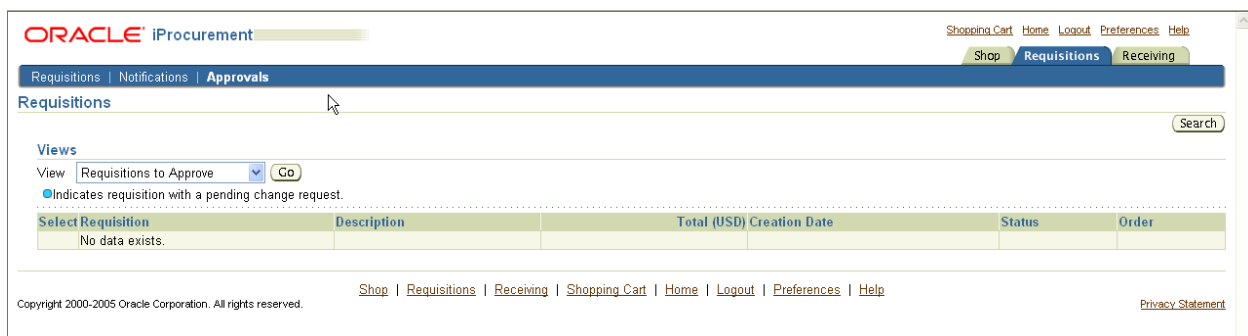
Copyright 2000-2005 Oracle Corporation. All rights reserved.

Privacy Statement

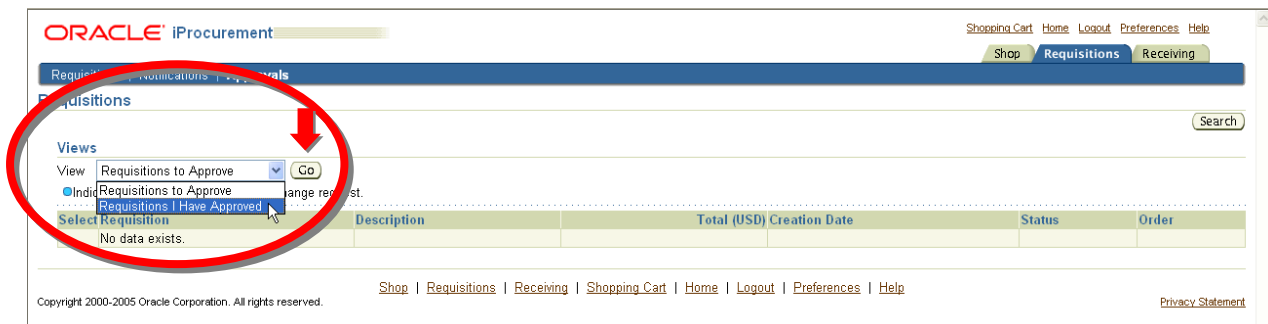
Note: To ensure the Requisition was approved and submitted to the next approval level, Click on the **Approvals** link in the blue task bar at the top of the page.



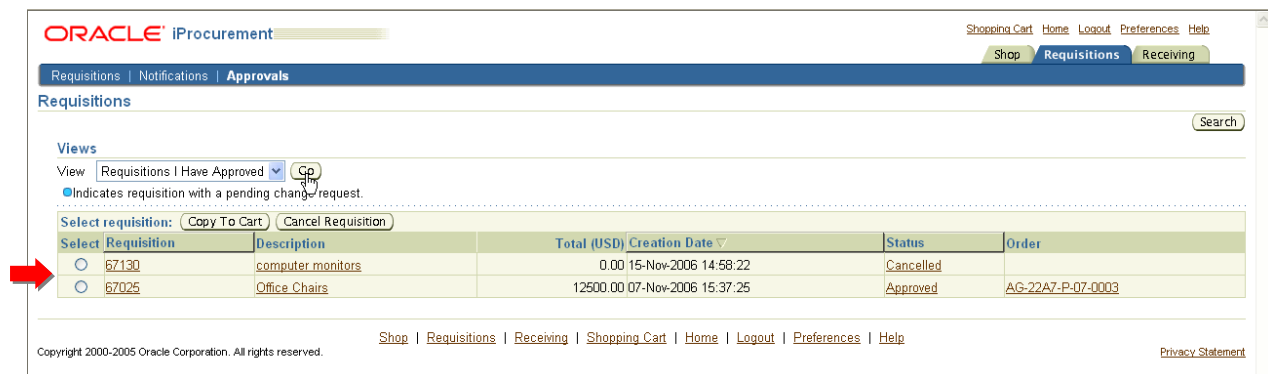
This will take you to the *Requisition Approvals* page.



This page defaults to viewing the Requisitions that await the user's approval. To see the Requisitions that have already been approved, click on the *View* drop down menu and select **Requisitions I have Approved**. Then click on the **Go** button to change the view.



This will change the view to show all the Requisitions that have been approved.



Notice that in this example, the Requisition number 67025 that was approved by the Management Approver earlier has gone through the Requisition and Acquisition processes. This is shown by the order number in the *Order* column. When you first approve the Requisition, it will appear as Pre-Approved until the Budget Approver and FFIS have approved the document. To find out more about the Requisition Status, please refer to the **Requisitions – Tracking Requisition Status** section (page 73) of this document.

Budget (Funds) Approval

The function of a Budget Approver, also called Funds Approver, in IAS is to review and approve Requisitions as submitted by Requisitioners. Budget Approvers ensure the accuracy of the Budget Codes and ensure that the funds have the proper apportionment before Requisitions are made against them. In this section, you will learn how to check the accounting codes of a Requisition and edit them if necessary.

When a Budget Approver logs into IAS, the *Shop* page will be displayed on your screen. It will look just like the *Shop* page looks for a Management Approver. In the *My Notifications* section, a portion of your Requisitions will be displayed.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Stores | Categories | Shopping Lists | Non-Catalog Request

Search: Main Store [Go] Advanced Search

Stores

Main Store Exchange Oracle.com

My Requisitions (Full List)

Requisition	Description	Total (USD)	Status	Copy	Change	Receive
No data exists.						

My Notifications (Full List)

Type	From	Subject	Sent
Requisition	MANAGER, BARRY	Purchase Requisition 67064 for REQUISITIONER, DAVE (10000.00 USD)	13-Nov-2006
Requisition	MANAGER, SUSAN	Purchase Requisition 67024 for REQUISITIONER, DAVE (24600.00 USD)	09-Nov-2006

[TIP](#) Vacation Rules - Redirect or auto-respond to notifications.

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Remember! The *My Notifications* section of the *Shop* page may not display the entire list of all Requisitions awaiting approval.

To continue, click on the subject of the Notification. This will take you to the *Purchase Requisition* page. You should see the *Purchase Requisition* page for the Requisition selected for approval. This page is more commonly known as the *Notification Details* page.

ORACLE iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Shop](#) [Requisitions](#) [Receiving](#)

[Requisitions](#) | [Notifications](#) | [Approvals](#)

[Shop: Stores >](#)

Purchase Requisition 67064 for REQUISITIONER, DAVE (10000.00 USD)

From: **MANAGER, BARRY** Description: **IBM ThinkPad Laptops for remote employees**
 To: **MANAGER, CHARLIE** Requisition Total: **10000.00 USD**
 Sent: **13-Nov-2006 08:22:20** Estimated Tax: **0.00 USD**
 ID: **308886**

[Approve](#) [Approve And Forward](#) [Forward](#) [Reject](#) [Reassign](#) [Request Information](#)

Requisition Lines

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	IBM ThinkPad Laptops for remote employees		30	EACH	4	2500	10000.00

Approval Sequence

Num	Name	Action	Action Date	Note
1	REQUISITIONER, DAVE	Submitted	09-Nov-2006 15:11:51	
2	REQUISITIONER, DAVE	Forwarded	09-Nov-2006 15:11:52	
3	MANAGER, SUSAN	Approved	09-Nov-2006 15:31:25	
4	MANAGER, BARRY	Approved	13-Nov-2006 08:22:09	
5	MANAGER, CHARLIE	Pending		

Related Applications

[Edit Requisition](#)
[View Requisition Details](#)

Response

Forward To:

Note:

[Return to Worklist](#) [Approve](#) [Approve And Forward](#) [Forward](#) [Reject](#) [Reassign](#) [Request Information](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved. [Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#) [Privacy Statement](#)

Tip! To ensure you are on the correct page, look at the Title Bar which should include the Requisition number, the name of the original Requisitioner, and the total amount of the Requisition. In this case, the Requisition number is 67064, the Requisitioner's name is Dave Requisitioner, and the amount of the Requisition is \$10,000.

Reviewing the Requisition Details

Again, the basic information about the Requisition is available here. To see additional details, including the accounting information, click on the **View Requisition Details** link under the *Related Applications* section, just like the Management Approver did.

Related Applications

- [Edit Requisition](#)
[View Requisition Details](#)

This takes you to the *Requisition Details* page.

ORACLE[®] iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Shop](#) [Requisitions](#) [Receiving](#)


[Requisitions](#) | [Notifications](#) | [Approvals](#)

[Shop: Stores](#) > [Notification Details](#) >

Requisition 67064 OK

Description	IBM ThinkPad Laptops for remote employees	Status	Pre-Approved
Created By	REQUISITIONER, DAVE	Change History	No
Creation Date	09-Nov-2006 14:44:27	Urgent Requisition	No
Deliver-To	3101 PARK CENTER DRIVE ROOM 906 ALEXANDRIA, VA, 22302	Attachment	None
Justification		Note to Buyer	


Details

Line	Description	Need By	Deliver-To	Unit	Quantity	Price	Amount (USD)	Details	Order
1	IBM ThinkPad Laptops for remote employees	29-Dec-2006 00:00:00	FNS-HQ-ADMIN	EACH	4	2500 USD	10000.00		
Total							10000.00		

[Return](#) OK

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved. [Privacy Statement](#)

As with the Management Approval process, you can see further details about Line Items in your Requisition by clicking on the **Details** icon, , in the *Details* column of the page.

ORACLE[®] iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Shop](#) [Requisitions](#) [Receiving](#)


[Requisitions](#) | [Notifications](#) | [Approvals](#)

[Shop: Stores](#) > [Notification Details](#) >

Requisition 67064 OK

Description	IBM ThinkPad Laptops for remote employees	Status	Pre-Approved
Created By	REQUISITIONER, DAVE	Change History	No
Creation Date	09-Nov-2006 14:44:27	Urgent Requisition	No
Deliver-To	3101 PARK CENTER DRIVE ROOM 906 ALEXANDRIA, VA, 22302	Attachment	None
Justification		Note to Buyer	

Details

Line	Description	Need By	Deliver-To	Unit	Quantity	Price	Amount (USD)	Details	Order
1	IBM ThinkPad Laptops for remote employees	29-Dec-2006 00:00:00	FNS-HQ-ADMIN	EACH	4	2500 USD	10000.00		
Total							10000.00		

[Return](#) OK

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved. [Privacy Statement](#)

You should see a page displaying further details for that line item.

ORACLE[®] iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Shop](#) [Requisitions](#) [Receiving](#)

[Requisitions](#) | [Notifications](#) | [Approvals](#)

[Shop: Stores](#) > [Notification Details](#) > [Requisition 67064](#) >

Requisition 67064 Line 1: Details OK

Requisition

Description	IBM ThinkPad Laptops for remote employees	Current Approver	MANAGER, CHARLIE
Status	Pre-Approved	Approver Phone	
Change History	No	Date Sent to Approver	09-Nov-2006

[Show Additional Information](#)

Order

No data exists.

Shipment

Shipment	Shipment Date	Expected Receipt Date	Freight Carrier	Tracking Number	Track Shipment
No data exists.					

Receipt

Receipt	Transaction Date	Received Unit	Received By	Received by Phone	Items Returned
No data exists.					

[Return](#) OK

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved. [Privacy Statement](#)

Tip! To see a third level of details, click the **Show Additional Information** link located in the *Requisition* section of this page. This is where you can find the Accounting information.

Remember! It's very important to review the Accounting Information. Many avoidable errors occur because of incorrect Accounting Codes.

ORACLE iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Shop](#) [Requisitions](#) [Receiving](#)

[Requisitions](#) | [Notifications](#) | [Approvals](#)

[Shop: Stores](#) > [Notification Details](#) > [Requisition 67064](#) >

[Requisition 67064 Line 1: Details](#) OK

Requisition

Description: **IBM ThinkPad Laptops for remote employees**
 Status: **Pre-Approved**
 Change History: **No**

Current Approver: **MANAGER_CHARLIE**
 Approver Phone:
 Date Sent to Approver: **09-Nov-2006**

[Hide Additional Information](#)
[Item Information](#)

Requester: **REQUISITIONER_DAVE**
 Need-By Date: **29-Dec-2006 00:00:00**
 Item Number:
 Category Description: **MISCELLANEOUS ITEMS**
 P-Card Used: **No**
 Taxable: **No**

Deliver-To Location: **FNS-HQ-ADMIN**
 Destination Type: **Expense**
 Inventory Replenishment Request: **No**
 Supplier:
 Supplier Site:
 Supplier Contact:
 Contact Phone:
 Supplier Item:
 Transaction Code: **IQ-COMMIT**

Charge Account

Charge Account	Project Number	Task Number	Expenditure Type	Expenditure Organization	Expenditure Item Date	Percent
30.07 ZZ ZZ ZZ ZZ ZZ ZZ ZZ ZZ ZZ ZZ ZZ 700000000.0210 ZZ ZZ ZZ ZZ ZZ ZZ ZZ ZZ						100

Attachment

File Name	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No data exists.								

Order

No data exists.

Shipment

Shipment	Shipment Date	Expected Receipt Date	Freight Carrier	Tracking Number	Track Shipment
No data exists.					

Receipt

Receipt	Transaction Date	Received Unit	Received By	Received by Phone	Items Returned
No data exists.					

OK

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved. [Privacy Statement](#)

In this example, the accounting code was set use money from the wrong budget. As the Budget Approver, you can edit the Requisition so that it uses the correct account code. First, return to the *Requisition* screen. Click on the **OK** button to return to the previous details screen.

ORACLE iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Shop](#) [Requisitions](#) [Receiving](#)

[Requisitions](#) | [Notifications](#) | [Approvals](#)

[Shop](#) | [Stores](#) > [Notification Details](#) > [Requisition 67064](#) >

Requisition 67064 Line 1: Details

Requisition

Description: **IBM ThinkPad Laptops for remote employees**
Status: **Pre-Approved**
Change History: **No**

Current Approver: **MANAGER, CHARLIE**
Approver Phone:
Date Sent to Approver: **09-Nov-2006**

[Hide Additional Information](#)

Item Information

Requester: **REQUISITIONER, DAVE**
Need-By Date: **29-Dec-2006 00:00:00**
Item Number:
Category Description: **MISCELLANEOUS ITEMS**
P-Card Used: **No**
Taxable: **No**

Deliver-To Location: **FNS-HQ-ADMIN**
Destination Type: **Expense**
Inventory Replenishment Request: **No**
Supplier:
Supplier Site:
Supplier Contact:
Contact Phone:
Supplier Item:
Transaction Code: **IO-COMMIT**

Charge Account

Charge Account	Project Number	Task Number	Expenditure Type	Expenditure Organization	Expenditure Item Date	Percent
30.07. ZZ ZZZZZZ ZZZZZZ ZZ ZZZZZZ ZZ 700000000.0210. ZZ ZZZZZZ ZZZZ						100

Attachment

File Name	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No data exists.								

Order

No data exists.

Shipment

Shipment	Shipment Date	Expected Receipt Date	Freight Carrier	Tracking Number	Track Shipment
No data exists.					

Receipt

Receipt	Transaction Date	Received Unit	Received By	Received by Phone	Items Returned
No data exists.					

[OK](#)

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved. [Privacy Statement](#)

Select the **OK** button one additional time to return to the *Purchase Requisition* screen.

ORACLE iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Shop](#) [Requisitions](#) [Receiving](#)

[Requisitions](#) | [Notifications](#) | [Approvals](#)

[Shop](#) | [Stores](#) >

Purchase Requisition 67064 for REQUISITIONER, DAVE (10000.00 USD)

[Approve](#) [Approve And Forward](#) [Forward](#) [Reject](#) [Reassign](#) [Request Information](#)

From: **MANAGER, BARRY**
To: **MANAGER, CHARLIE**
Sent: **13-Nov-2006 08:22:20**
ID: **308886**

Description: **IBM ThinkPad Laptops for remote employees**
Requisition Total: **10000.00 USD**
Estimated Tax: **0.00 USD**

Requisition Lines

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	IBM ThinkPad Laptops for remote employees		30	EACH	4	2500	10000.00

Approval Sequence

Num	Name	Action	Action Date	Note
1	REQUISITIONER, DAVE	Submitted	09-Nov-2006 15:11:51	
2	REQUISITIONER, DAVE	Forwarded	09-Nov-2006 15:11:52	
3	MANAGER, SUSAN	Approved	09-Nov-2006 15:31:25	
4	MANAGER, BARRY	Approved	13-Nov-2006 08:22:09	
5	MANAGER, CHARLIE	Pending		

Related Applications

[Edit Requisition](#)
[View Requisition Details](#)

Response

Forward To: **All Employees and Users**

Note:

[Return to Worklist](#) [Approve](#) [Approve And Forward](#) [Forward](#) [Reject](#) [Reassign](#) [Request Information](#)

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved. [Privacy Statement](#)

To edit the Accounting codes, you will have to take the Requisition back through the checkout process. Click on the **Edit Requisition** link in the *Related Applications* section where you went to view the Requisition Details. This will allow you to edit the Requisition information by going through the Approver Checkout Process.

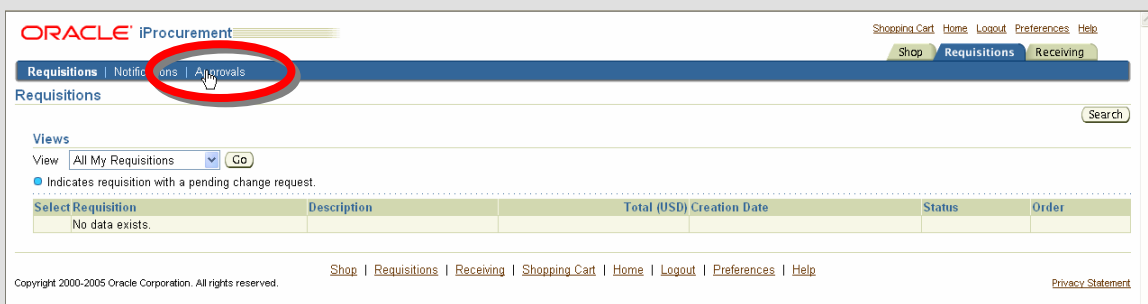
HOW TO: Respond to Requisition Approvals and Change the Requisition

As an Approver, when editing a Requisition, you may be used to accessing it from the *Requisition: Approvals* page. You may know this as the *Notification: Approvals* page.

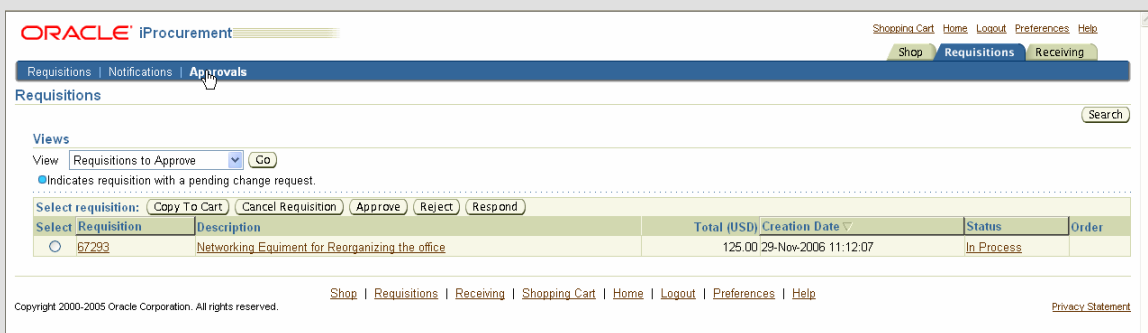
If you are used to editing Requisitions in this manner, **DO NOT COPY TO CART!** Copying to Cart actually creates a new Requisition. If you create a new Requisition, your Requisitioners will not be able to receive items.

Here is how it works.

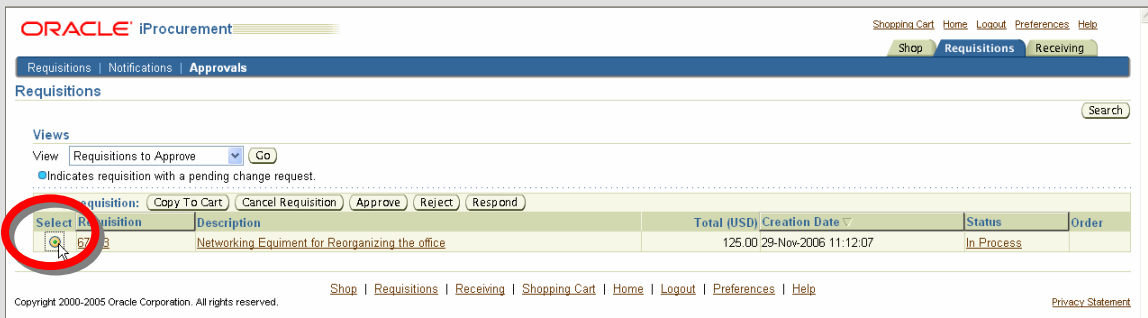
From the *Requisitions* tab, click the **Approvals** link in the Navigation bar.



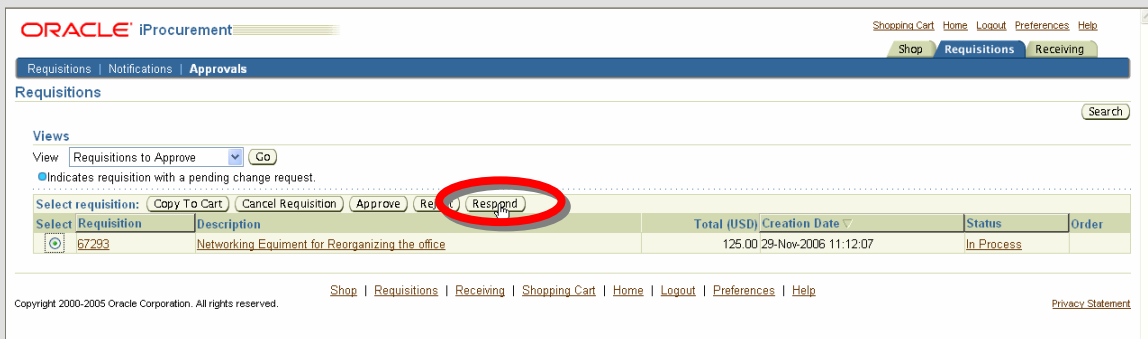
The *Requisitions: Approvals* page will now be displayed. Often this page is referred to by users as the *Notifications: Approvals* page.



Select the appropriate Requisition from the list by clicking the **Select** radio button ☐ on this page.



Then select the **Respond** button.

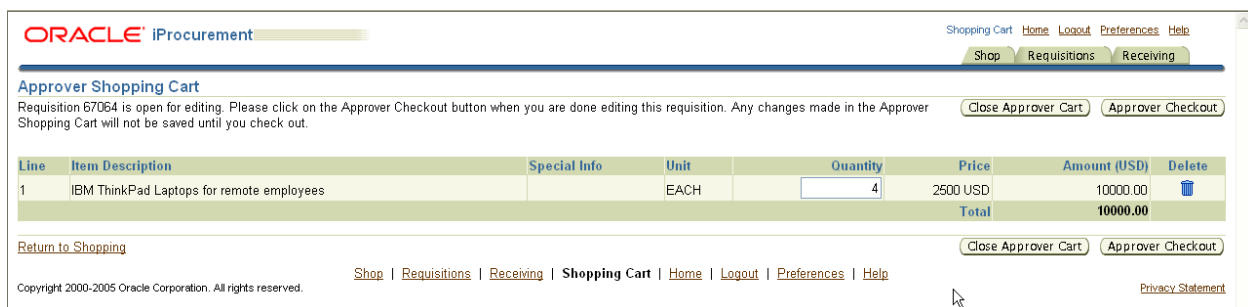


This will take you to the *Purchase Requisition* page. From there, click on the **Edit Requisition** link in the *Related Applications* section where you went to view the Requisition Details. This will allow you to edit the Requisition information by going through the Approver Checkout Process.

Remember! DO NOT COPY TO CART! This creates a new Requisition and your Requisitioners will not be able to receive items.

Edit the Requisition as the Approver

The first page of the Approver Checkout Process is the *Approver Shopping Cart*.



Here you can change many aspects of the Requisition. In this example, the only change that needs to be made is the budget code. Otherwise you could change the quantity or delete the line item just as if you were a Requisitioner changing the Requisition.

To continue, click on the **Approver Checkout** button.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Approver Shopping Cart

Requisition 67064 is open for editing. Please click on the Approver Checkout button when you are done editing this requisition. Any changes made in the Approver Shopping Cart will not be saved until you check out.

Close Approver Cart Approver Checkout

Line	Item Description	Special Info	Unit	Quantity	Price	Amount (USD)	Delete
1	IBM ThinkPad Laptops for remote employees		EACH	4	2500 USD	10000.00	
Total						10000.00	

Return to Shopping

Close Approver Cart Approver Checkout

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved.

This will take you to the *Checkout: Requisition Information* page. This looks, and works, just like the *Checkout: Requisition Information* page in the Requisitioner's section. To edit the accounting information, click on the **Edit Lines (Delivery, Billing, Accounts and Attachments)** button.

ORACLE iProcurement

Shopping Cart Home Logout Preferences

Shop Requisitions Receiving

Checkout: Requisition Information

* Indicates required field

* Requisition Description IBM ThinkPad Laptops for remote employees

Delivery

* Need-By Date 29-Dec-2006 00:00:00
(example: 13-Nov-2006 19:45:00)

Requester REQUISITIONER, DAVE

* Deliver-To Location FNS-HQ-ADMIN

Billing

* Taxable No

* Transaction Code IQ-COMMIT

Edit Lines (Delivery, Billing, Accounts and Attachments) Step 1 of 3 Next

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved.

This will take you to the *Requisition Information: Edit Lines* page. Click on the **checkbox** in the *Select* column, and then click on the **Update** button.

ORACLE iProcurement

Shopping Cart Home Logout Preferences

Shop Requisitions Receiving

Requisition Information: Edit Lines

* Indicates required field

Delivery Billing Accounts Attachments

Select Lines: Update Copy Delete

Select None

Select	Description	Need-By Date	Requester	Deliver-To Location
<input checked="" type="checkbox"/>	1 IBM ThinkPad Laptops for remote employees	29-Dec-2006 00:00:00	REQUISITIONER, DAVE	FNS-HQ-ADMIN

Delivery Billing Accounts Attachments

Return

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences

Copyright 2000-2005 Oracle Corporation. All rights reserved.

This will take you to the *Requisition Information: Update Selected Line* page.

ORACLE iProcurement

Shopping Cart Home Logout Preferences

Shop Requisitions Receiving

Requisition Information Approvers Review & Submit

Requisition Information: Update Selected Line

* Indicates required field

Item

* Description: IBM ThinkPad Laptops for remote employees

* Category: 9999

* Quantity: 4

* Unit of Measure: EACH

* Unit Price: 2500

Amount: 10000

* Currency: USD

Special Information

Supplier

☐ New Supplier

Supplier:

Site:

Contact Name:

Phone:

Fax:

Email:

Supplier Item:

Manufacturer:

Manufacturer Part Number:

Delivery

☐ Urgent

* Need-By Date: 29-Dec-2006 00:00:00

(example: 13-Nov-2006 19:45:00)

Requester: REQUISITIONER, DAVE

* Deliver-To Location: FNS-HQ-ADMIN

Billing

* Taxable: No

Charge Account: 30.07.ZZ.ZZZZZZ.ZZZZZZ.ZZ.7000000000.0210.ZZ.ZZZZZZZZ.ZZZZ

Transaction Code: IQ-COMMIT

Notes and Attachments

Note To Supplier:

Return

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Click on the **accounting code** link to go to the *Requisition Information: Split Cost Allocation* page.

ORACLE iProcurement

Shopping Cart Home Logout Preferences

Shop Requisitions Receiving

Requisition Information Approvers Review & Submit

Requisition Information: Split Cost Allocation

* Indicates required field

Selected Line

Line Description	Unit	Quantity	Price	Amount (USD)
1 IBM ThinkPad Laptops for remote employees	EACH	4	2500 USD	10000.00

Charge Accounts

Line Accounting Flexfield	Transaction Code	Percent	Quantity	Amount (USD)	Delete
1 30.07.ZZ.ZZZZZZ.ZZZZZZ.ZZ.7000000000.0210.ZZ.ZZZZZZZZ.ZZZZ APPLICATION ID (2 chars max) SEG BFI (2 chars max) FUND (8 chars max) BUDGET ORG (7 chars max) SUB BUDGET ORG (2 chars max) COST ORG (7 chars max) SUB COST ORG (2 chars max) PROGRAM (8 chars max) BOC (4 chars max) SUB BOC (2 chars max) JOB CODE (8 chars max) REPORT CATEGORY (4 chars max)	IQ-COMMIT	100	4	10000.00	
Total		100	4	10000.00	

Charge Accounts

☒ **TIP** Total allocation must equal 100% of the selected line values.

☐ Apply this Cost Allocation information to all applicable requisition lines

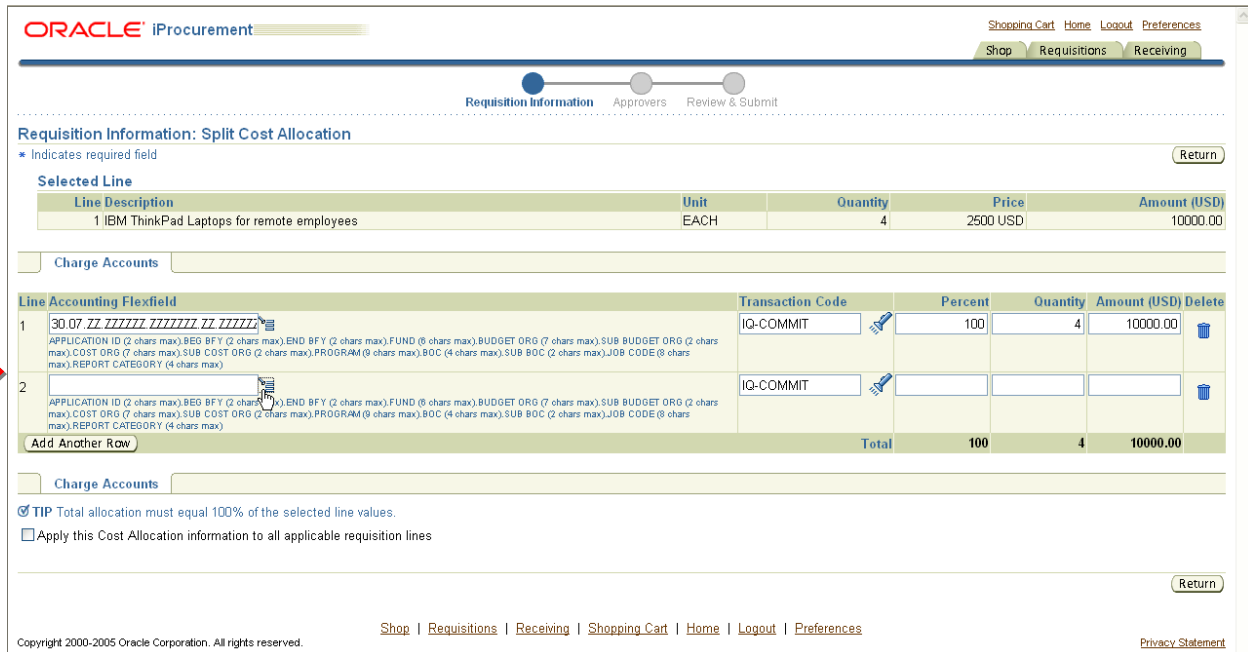
Return

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Since the accounting code has already been set for the Requisition, the accounting code here will not default to the accounting code you set up in your profile.

To add an additional line of accounting, click on the **Add Another Row** button. It will automatically create a new accounting line to enter in more information. It defaults to the favorite accounting code you set up in your preferences. Since Management and Budget Approvers do not have to set up default profiles, as they are not creating Requisitions, the field will be blank for those who have not set up a profile. The *Transaction Code* for the new line defaults to IQ-COMMIT, just as the first line did.



ORACLE iProcurement

Shopping Cart Home Logout Preferences

Shop Requisitions Receiving

Requisition Information Approvers Review & Submit

Requisition Information: Split Cost Allocation

* Indicates required field

(Return)

Selected Line

Line	Description	Unit	Quantity	Price	Amount (USD)
1	1 IBM ThinkPad Laptops for remote employees	EACH	4	2500 USD	10000.00

Charge Accounts

Line Accounting Flexfield

Line	Transaction Code	Percent	Quantity	Amount (USD)	Delete
1	30.07.11.1111111111.11.1111111111	100	4	10000.00	
2					
Total			100	4	10000.00

Add Another Row

Charge Accounts


☒ **TIP** Total allocation must equal 100% of the selected line values.

☐ Apply this Cost Allocation information to all applicable requisition lines

(Return)

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Click on the **Accounting Search** icon  next to the empty accounting line. This will open a new window where you can enter in the proper accounting information.

Oracle iProcurement

Shopping Cart Home Logout Preferences

Shop Requisitions Receiving

Return

Amount (USD)

10000.00

Quantity Amount (USD) Delete

4 10000.00

4 10000.00

Return

Privacy Statement

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Search and Select List of Values - Microsoft Internet Explorer

Search and Select: Accounting Flexfield

Cancel Select

Search

APPLICATION ID (2 chars max)

BEG BFY (2 chars max)

END BFY (2 chars max)

FUND (6 chars max)

BUDGET ORG (7 chars max)

SUB BUDGET ORG (2 chars max)

COST ORG (7 chars max)

SUB COST ORG (2 chars max)

PROGRAM (9 chars max)

BOC (4 chars max)

SUB BOC (2 chars max)

JOB CODE (8 chars max)

REPORT CATEGORY (4 chars max)

Search Create

Results

Select CodeCombination

No search conducted.

Cancel Select

Change the accounting information as necessary.

Note: As you enter information into the fields, the page may refresh and add information for you. This can take a few minutes, depending on the speed of your network connection and the resource usage within IAS. Wait for the page to finish loading, then continue to add information until all appropriate fields are filled.

Once you have the accounting code correct, click on the **Create** button below the fields.

ORACLE iProcurement

Shopping Cart Home Logout Preferences

Shop Requisitions Receiving

Requisition Information Approvals Review & Submit

Requisition Information: Sp

Indicates required field

Selected Line

Line Description
1 IBM ThinkPad Laptop

Charge Accounts

Line Accounting Flexfield

1 30 07 ZZ ZZZZZZ ZZZZZZ ZZ ZZZZZZ
APPLICATION ID (2 chars max) BEG BFY (2 chars max) COST ORG (7 chars max) SUB BUDGET ORG (2 chars max) COST ORG (7 chars max) SUB COST ORG (2 chars max) PROGRAM (3 chars max) BOC (4 chars max) SUB BOC (2 chars max) JOB CODE (3 chars max) REPORT CATEGORY (4 chars max)

Add Another Row

Charge Accounts

TIP Total allocation must equal 10000.00
Apply this Cost Allocation information

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Search and Select List of Values - Microsoft Internet Explorer

Search and Select: Accounting Flexfield

Search

APPLICATION ID (2 chars max) 30
BEG BFY (2 chars max) ZZ
END BFY (2 chars max) ZZ
FUND (6 chars max) ZZZZZZ
BUDGET ORG (7 chars max) ZZZZZZ
SUB BUDGET ORG (2 chars max) ZZ
COST ORG (7 chars max) ZZZZZZ
SUB COST ORG (2 chars max) ZZ
PROGRAM (3 chars max) 702104000
BOC (4 chars max) 0210
SUB BOC (2 chars max) ZZ
JOB CODE (3 chars max) ZZZZZZ
REPORT CATEGORY (4 chars max) ZZZZZZ

Search Create

Results

Select CodeCombination

No search conducted.

Cancel Select

Quantity Amount (USD) Delete

4 10000.00

4 10000.00

Return

Privacy Statement

https://green.usda.gov/8012/OA_HTML/OA.jsp?_rc=/oracle/apps/fnd/framework/avebul/...

This will create an accounting line in the *Results* area. Click on the radio button next to the accounting line you just created, then click on the **Select** button at the bottom of the window.

Tip! You may need to scroll down to see the **Select** button.

Once you have selected the accounting line, the *Search and Select: Accounting Flexfield* pop up window will automatically close and the information will populate the *Accounting Flexfield* text box. The *Percent*, *Quantity*, and *Amount (USD)* fields will not populate automatically.

Tip! You can use any of the three fields to update the other two. Here's how it works: if you enter in a percentage in the *Percent* field, then click anywhere else on the page, the *Quantity* and *Amount (USD)* fields will update automatically for that line. Alternatively, if you were doing a quantity based Requisition for 6 items, and

you wanted two items to be paid by a certain accounting code, you would just enter "2" in the *Quantity* field and the *Percent* would automatically update to be 33.33333333% and the *Amount (USD)* field would reflect the cost of two items.

Note: This works on a line by line basis.

Warning! Before continuing, make sure that the *Total* line at the bottom comes to 100%.

Once you have finished adjusting the accounting, you can click on the **Return** button to go back to *Requisition Information: Update Selected Line* page.

ORACLE iProcurement Shopping Cart Home Logout Preferences

Shop Requisitions Receiving

Requisition Information Approvers Review & Submit

Requisition Information: Split Cost Allocation

* Indicates required field

Selected Line

Line Description	Unit	Quantity	Price	Amount (USD)
1 IBM ThinkPad Laptops for remote employees	EACH	4	2500 USD	10000.00

Charge Accounts

Line	Accounting Flexfield	Transaction Code	Percent	Quantity	Amount (USD)	Delete
1	30 07 11 11111 11111 11 11111	IQ-COMMIT	50	2	5000.00	
2	30 07 11 11111 11111 11 11111	IQ-COMMIT	50	2	5000.00	
Total			100	4	10000.00	

Charge Accounts

☒ **TIP** Total allocation must equal 100% of the selected line values.

☐ Apply this Cost Allocation information to all applicable requisition lines

Return

Copyright 2000-2005 Oracle Corporation. All rights reserved. Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences

[Privacy Statement](#)

Review the page again to check for information that may need to be adjusted.

ORACLE iProcurement

Shopping Cart Home Logout Preferences

Shop Requisitions Receiving

Requisition Information Approvers Review & Submit

Requisition Information: Update Selected Line

* Indicates required field

Item

* Description: IBM ThinkPad Laptops for remote employees

* Category: 9999

* Quantity: 4

* Unit of Measure: EACH

* Unit Price: 2500

Amount: 10000

* Currency: USD

Special Information

Supplier

☐ New Supplier

Supplier

Site

Contact Name

Phone

Fax

Email

Supplier Item

Manufacturer

Manufacturer Part Number

Delivery

☐ Urgent

* Need-By Date: 29-Dec-2006 00:00:00

(example: 13-Nov-2006 19:45:00)

Requester: REQUISITIONER, DAVE

* Deliver-To Location: FNS-HQ-ADMIN

Billing

* Taxable: No

Charge Account: Multiple

Transaction Code: IQ-COMMIT

Notes and Attachments

Note To Supplier

Return

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences

Privacy Statement

Note: The *Charge Account* field now says "Multiple" to reflect the multiple lines of accounting.

Once all of the information has been verified, click on the **Return** button to go to the *Requisition Information: Edit Lines* page.

ORACLE iProcurement

Shopping Cart Home Logout Preferences

Shop Requisitions Receiving

Requisition Information Approvers Review & Submit

Requisition Information: Edit Lines

* Indicates required field

Delivery **Billing** **Accounts** **Attachments**

Select Lines: (Update) (Copy) (Delete)

Select All | Select None

Select Line	Description	Need-By Date	Requester	Deliver-To Location
<input checked="" type="checkbox"/> 1	IBM ThinkPad Laptops for remote employees	29-Dec-2006 00:00:00	REQUISITIONER, DAVE	FNS-HQ-ADMIN

Delivery **Billing** **Accounts** **Attachments**

Return

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences

Privacy Statement

Verify that all of this information is correct, and then click on the **Return** to go back to the *Checkout: Requisition Information* page.

ORACLE iProcurement

Shopping Cart Home Logout Preferences

Shop Requisitions Receiving

Requisition Information Approvers Review & Submit

Checkout: Requisition Information

* Indicates required field

* Requisition Description IBM ThinkPad Laptops for remote employees

Delivery

* Need-By Date 29-Dec-2006 00:00:00
(example: 13-Nov-2006 19:45:00)

Requester REQUISITIONER, DAVE

* Deliver-To Location FNS-HQ-ADMIN

Billing

* Taxable No

* Transaction Code IQ-COMMIT

Edit Lines (Delivery, Billing, Accounts and Attachments) Step 1 of 3 Next

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Shop Requisitions Receiving Shopping Cart Home Logout Preferences

Privacy Statement

Now that you've finished editing the Requisition, click on the **Next** button to continue and complete the Approver Checkout process. This will take you to Step 2: *Review Approver List*.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisition Information Approvers Review & Submit

Checkout: Review Approver List

Your requisition will be sent to the following list of approvers.

Submit Back Step 2 of 3 Next

Approver Name	Justification (240 chars max)	Note To Buyer (240 chars max)	Delete
MANAGER, CHARLIE			

Add Approver

Attachments

Add Attachments

File Name	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No data exists.								

Submit Back Step 2 of 3 Next

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Shop Requisitions Receiving Shopping Cart Home Logout Preferences Help

Privacy Statement

In this example, Charlie Manager is the last approver in the chain so he is the only one listed in the approver list. If the Management Approver, or any intermediate Approver in the chain, edited the Requisition, the Approver List would reflect the names of the approvers in the chain that still had to approve the Requisition.

Click on the **Next** button to continue to the final step in the Checkout process – *Review and Submit*.

Here you can review the details of the Requisition one last time before submitting it.

Remember! Click on the **Show** link in the *Details* column of the *Lines* section to see the details for each line. As with the final checkout page for Requisitioners, Approvers can get a printer-friendly version of the page by clicking on the **Printable Page** button.

To finalize the changes made, click on the **Submit** button.

This will take you to a confirmation page stating that your edits have been saved.

ORACLE iProcurement

Shopping Cart Home Logout Preferences

Shop Requisitions Receiving

Confirmation

Your edits to Requisition 67064 have been saved.

Now that you've updated the requisition, click on **Continue** to return to the notification and complete your approval response. Note that the notification was generated based on the original requisition and won't reflect the edits you've just made.

Continue

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Note: This only completes the checkout/editing process. The Requisition has NOT been approved at this point.

Click on the **Continue** button to go back to the *Purchase Requisition* page and approve the Requisition.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Shopping Cart >

Purchase Requisition 67064 for REQUISITIONER, DAVE (10000.00 USD)

From: MANAGER, BARRY Description: IBM ThinkPad Laptops for remote employees
To: MANAGER, CHARLIE Requisition Total: 10000.00 USD
Sent: 13-Nov-2006 08:22:20 Estimated Tax: 0.00 USD
ID: 308886

Approve Approve And Forward Forward Reject Reassign Request Information

Requisition Lines

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	IBM ThinkPad Laptops for remote employees		30	EACH	4	2500	10000.00

Approval Sequence

Num	Name	Action	Action Date	Note
1	REQUISITIONER, DAVE	Submitted	09-Nov-2006 15:11:51	
2	REQUISITIONER, DAVE	Forwarded	09-Nov-2006 15:11:52	
3	MANAGER, SUSAN	Approved	09-Nov-2006 15:31:25	
4	MANAGER, BARRY	Approved	13-Nov-2006 08:22:09	
5	MANAGER, CHARLIE	Pending		

Related Applications

Edit Requisition
View Requisition Details

Response

Forward To: All Employees and Users

Note:

Return to Worklist

Approve Approve And Forward Forward Reject Reassign Request Information

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Warning! This notification was generated from the original Requisition. The detail information will NOT reflect the changes just made to the Requisition.

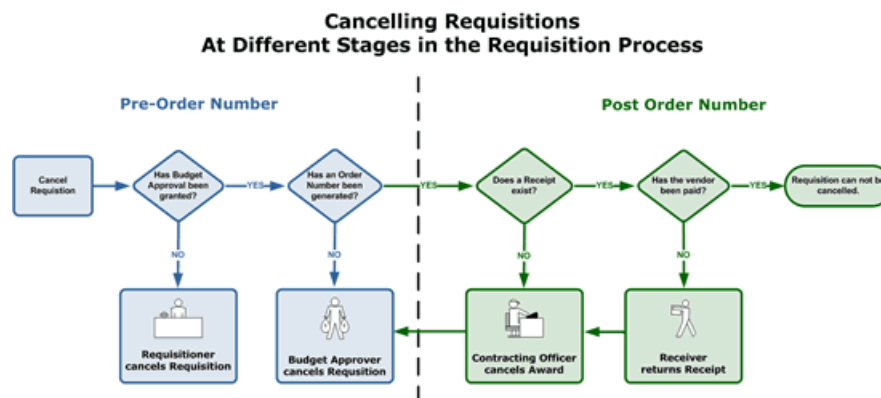
Now you can complete the Approval Process by clicking on the **Approve** button. This will take you back to your *Worklist* page, displaying all of the remaining notifications.

Canceling Requisitions

Business Process Guidelines

Budget Approvers may be tasked with canceling some Requisitions. Once the Requisition gets approved by the Funds Approvers and successfully submitted to FFIS, the system creates a commitment in the budget for that document. Once that happens, only the Budget Approver can cancel the Requisition, since only he/she has the proper rights in FFIS to decommit funds.

As a Requisition progresses further through the approval process associated documents may need to be cancelled before a Budget Approver is able to cancel a Requisition. For instance, if a receipt has been created, but payment has not been made the receipt must be returned and the Award document must be cancelled before a Requisition can be cancelled. After payment has been made to the vendor, however, the procurement process can not be reversed and a Requisition can no longer be cancelled. The diagram below illustrates the steps that must be taken to cancel a Requisition at various stages of the procurement process.

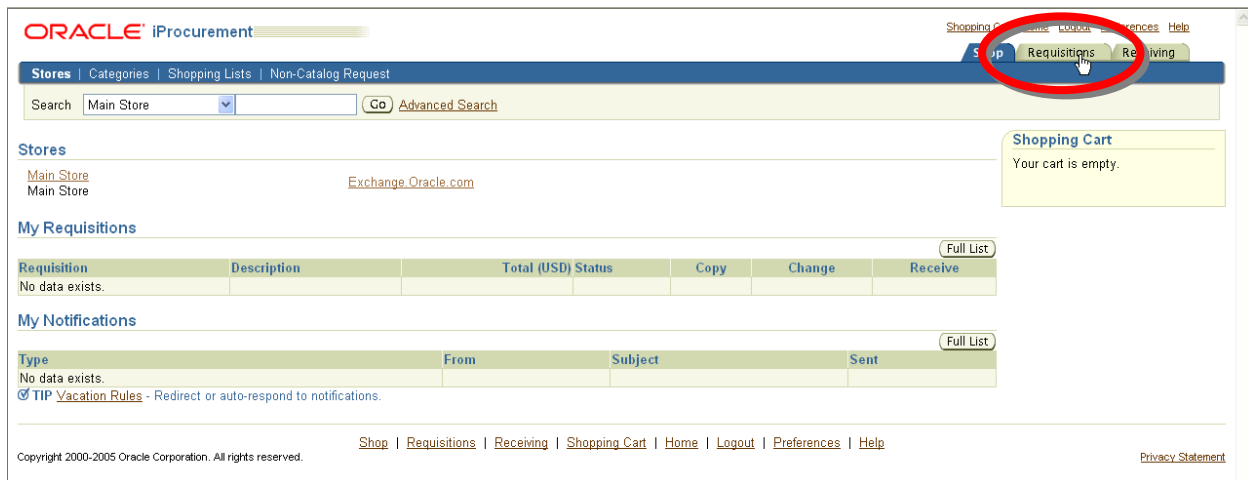


A Requisition can only be cancelled if it is NOT associated with a released award, at which point an Order Number has been created. To cancel a Requisition once an Order Number exists, the following procedure must be followed:

1. The Contracting Officer must cancel the line or the whole award for that requisition;
2. The cancellation is then approved by FFIS;

The Budget Approver can then cancel the line or the whole Requisition.

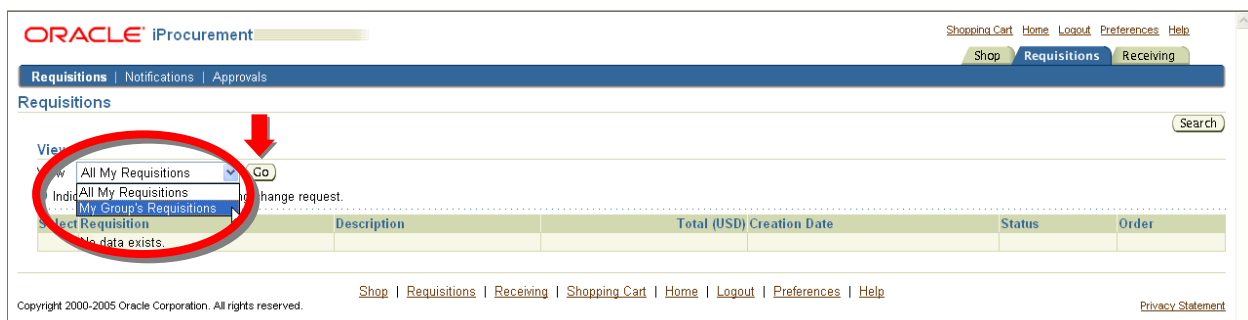
If you are not sure whether a Requisition has been awarded, you can go to the Requisition Details page to see if there is an Order number for the Requisition (or the individual lines). Search for the Requisition by clicking on the **Requisitions** tab in the top-right corner of the screen.



This will take you to the *Requisitions* page.



Notice that no Requisitions appear in this example. There are no Requisitions because the Budget Approver hasn't made any Requisitions. Budget Approvers can see all of the Requisitions sent to them, though, by changing the view options. Simply click on the arrow for the *View* menu and select **My Group's Requisitions** from the menu then click on the **Go** button.



This will allow you to see all Requisitions that you have worked (approved or rejected).

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Requisitions Search

Views

View My Group's Requisitions Go

Indicates requisition with a pending change request.

Select requisition: Copy To Cart Cancel Requisition Change

Select	Requisition	Description	Total (USD)	Creation Date	Status	Order
<input type="radio"/>	67152	Contract for cleaning the office	6720.00	17-Nov-2006 10:45:54	Approved	
<input type="radio"/>	67149	Contract for cleaning the office	14400.00	17-Nov-2006 09:53:10	Approved	
<input type="radio"/>	67064	IBM ThinkPad Laptops for remote employees	15000.00	09-Nov-2006 14:44:27	Approved	AG-1358-P-07-0003
<input type="radio"/>	67024	Contract to maintain grounds of local reserve	743600.00	07-Nov-2006 15:16:51	Approved	AG-1358-P-07-0002

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Note: You can also search for a particular Requisition by using the search function. Simply click on the **Search** button in the top-right corner of the screen and enter the appropriate criteria.

Notice that Requisition numbers 62064 and 67024 both have order numbers listed in the *Order* column. Those Requisitions have been associated with awards. To cancel them, the Budget Approver would need to talk to the Contracting Officer and get the Award cancelled first.

Remember! A common misconception regarding canceling Requisitions is that an award can be disassociated from a Requisition. Although PRISM provides the functionality to disassociate an award, it **does not** update Oracle and therefore **does not** update FFIS. An award **cannot** be disassociated from a requisition under any circumstances. The **only** way to update FFIS is to cancel the award.

Cancel Requisition Process in IAS

Here's how you cancel a Requisition. First, navigate to the *Requisitions* section by clicking on the **Requisitions** tab at the top-right of the window.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Stores | Categories | Shopping Lists | Non-Catalog Request

Search Main Store Go Advanced Search

Stores

[Main Store](#)
Main Store

[Exchange Oracle.com](#)

My Requisitions Full List

Requisition	Description	Total (USD)	Status	Copy	Change	Receive
No data exists.						

My Notifications Full List

Type	From	Subject	Sent
No data exists.			

☒ TIP [Vacation Rules](#) - Redirect or auto-respond to notifications.

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

This will take you to the *Requisitions* page.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Requisitions

Views

View: All My Requisitions (Go)

Indicates requisition with a pending change request.

Select Requisition	Description	Total (USD)	Creation Date	Status	Order
No data exists.					

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Notice that no Requisitions appear in this example. There are no Requisitions because the Budget Approver hasn't made any Requisitions. Budget Approvers can see all of the Requisitions sent to them, though, by changing the view options. Simply click on the arrow for the *View* menu and select **My Group's Requisitions** from the menu then click on the **Go** button.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Requisitions

Views

View: All My Requisitions (Go)

Indicates requisition with a pending change request.

Select Requisition	Description	Total (USD)	Creation Date	Status	Order
No data exists.					

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

This will allow you to see all Requisitions that you have worked (approved or rejected).

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Requisitions

Views

View: My Group's Requisitions (Go)

Indicates requisition with a pending change request.

Select requisition: Copy To Cart Cancel Requisition Change

Select	Requisition	Description	Total (USD)	Creation Date	Status	Order
<input type="radio"/>	67152	Contract for cleaning the office	6720.00	17-Nov-2006 10:45:54	Approved	
<input type="radio"/>	67149	Contract for cleaning the office	14400.00	17-Nov-2006 09:53:10	Approved	
<input type="radio"/>	67064	IBM ThinkPad Laptops for remote employees	15000.00	09-Nov-2006 14:44:27	Approved	AG-1358-P-07-0003
<input type="radio"/>	67024	Contract to maintain grounds of local reserve	743600.00	07-Nov-2006 15:16:51	Approved	AG-1358-P-07-0002

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Note: You can also search for a particular Requisition by using the search function. Simply click on the **Search** button in the top-right corner of the screen and enter the appropriate criteria.

Check the Select Radio button in the *Select* column and then click on the **Cancel Requisition** button to cancel the Requisition.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Requisitions Search

Views

View My Group's Requisitions Go

Indicates requisition with a pending change request.

Select Requisition: Copy To Cart Cancel Requisition Change

Select Requisition	Description	Total (USD)	Creation Date	Status	Order
<input type="radio"/> 67152	Contract for cleaning the office	6720.00	17-Nov-2006 10:45:54	Approved	
<input type="radio"/> 67049	Contract for cleaning the office	14400.00	17-Nov-2006 09:53:10	Approved	
<input type="radio"/> 67064	IBM ThinkPad Laptops for remote employees	15000.00	09-Nov-2006 14:44:27	Approved	AG-1358-P-07-0003
<input type="radio"/> 67024	Contract to maintain grounds of local reserve	743600.00	07-Nov-2006 15:16:51	Approved	AG-1358-P-07-0002

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Tip! You can also cancel the Requisition by going to the *Requisition Details* page and clicking on the **Cancel Requisition** button there.

This will take you to the *Cancel Requisition* screen.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Cancel Requisition 67152 (6720.00 USD): Select Lines

Indicates cancelled line Return to Requisition Cancel Entire Requisition (Only Funds Officers can cancel Approved or Pre-Approved requisitions) Continue

Indicates line has been modified by a buyer

Details	Line	Description	Order Type	Order Need-By	Unit	Quantity	Price Amount (USD)	Select
Show	1	Contract for cleaning the office	Purchase	27-Nov-2006 00:00:00 HOUR	560	12	USD 6720.00	<input type="checkbox"/>

Return to Requisition Cancel Entire Requisition (Only Funds Officers can cancel Approved or Pre-Approved requisitions) Continue

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Tip! Though this example only has one line item, this page will allow you to cancel a single line item, multiple line items or the entire Requisition.

Review this information carefully to ensure that you won't accidentally cancel the wrong requisition. Once you are satisfied that this is the right Requisition, click on the **Cancel Entire Requisition (Only Funds Officers can cancel Approved or Pre-Approved requisitions)** button to go to the *Cancel Requisition: Review and Submit* page.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Cancel Requisition 67152: Review and Submit

Return to Requisition Back Submit (Only Funds Officers can cancel Approved or Pre-Approved requisitions)

Request Created By **REQUISITIONER, DAVE** Request Creation Date **21-Nov-2006 10:13:28**

Old Requisition Total **6720.00 USD** Old Total Estimated Tax **0.00 USD**

New Requisition Total **0.00 USD** New Total Estimated Tax **0.00 USD**

Cancel Requisition Details

Indicates cancelled line

Indicates line has been modified by a buyer

Details	Line	Description	Order Type	Order Need-By	Unit	Quantity	Price Amount (USD)	Cancel Line
Show	1	Contract for cleaning the office	Purchase	27-Nov-2006 00:00:00 HOUR	560	12	USD 6720.00	Yes

Return to Requisition Back Submit (Only Funds Officers can cancel Approved or Pre-Approved requisitions)

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

Review the information about the Requisition one final time. When you are ready, click on the **Submit (Only Funds Officers can cancel Approved or Pre-Approved requisitions)** button to finalize the cancellation. This will take you to the *Confirmation* page.

ORACLE iProcurement

[Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Shop](#) [Requisitions](#) [Receiving](#)

[Requisitions](#) | [Notifications](#) | [Approvals](#)

Confirmation

Your cancellation request(s) for Requisition 67152 have been submitted for processing. View status of the cancellation request(s) from the [Requisition Status](#) page.

Cancel Requisition 67152: Confirmation Details

Request Created By	REQUISITIONER, DAVE	Request Creation Date	21-Nov-2006 10:13:28
Old Requisition Total	6720.00 USD	Old Total Estimated Tax	0.00 USD
New Requisition Total	0.00 USD	New Total Estimated Tax	0.00 USD

Cancel Requisition Details

Indicates cancelled line
 Indicates line has been modified by a buyer

Details	Line	Description	Order Type	Order Need-By	Unit	Quantity	Price Amount (USD)	Cancel Line
Show	1	Contract for cleaning the office	Purchase	27-Nov-2006 00:00:00	HOUR	560	12 USD	6720.00 Yes

[Return to Requisition Status](#)

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

Copyright 2000-2005 Oracle Corporation. All rights reserved.

[Privacy Statement](#)

Managing Notifications

Reassign Notifications During Absence

Management and Budget Approvers can create Notification Rules which automatically forward Requisition Approval Notifications to an alternate Approver when the original Approver unavailable to manage their Notifications directly, such as when they are absent for vacation. This allows a designated alternate to act in the place of the original Approver. This designated alternate is referred to as a **Proxy**.

Tip! It is highly recommended that you check with the person who will be acting on your behalf before setting him/her up as a Proxy. In addition to being courteous, it will help ensure that the Proxy Approver will be available during your absence to handle your Notifications.

To reassign Notifications, click on the **Vacation Rules** link under the *My Notifications* section on the *Shop* page.

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Stores | Categories | Shopping Lists | Non-Catalog Request

Search Main Store Go Advanced Search

Stores

Main Store Exchange Oracle.com

My Requisitions

Full List

Requisition	Description	Total (USD)	Status	Copy	Change	Receive
No data exists.						

My Notifications

Full List

Type	From	Subject	Sent
No data exists.			

TIP Vacation Rules - Redirect or auto-respond to notifications.

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

That takes you to the *Vacation Rules* page.

ORACLE iProcurement

Home Logout Preferences Help

Notifications Administration

Shop: Stores >

Vacation Rules

Create Rule

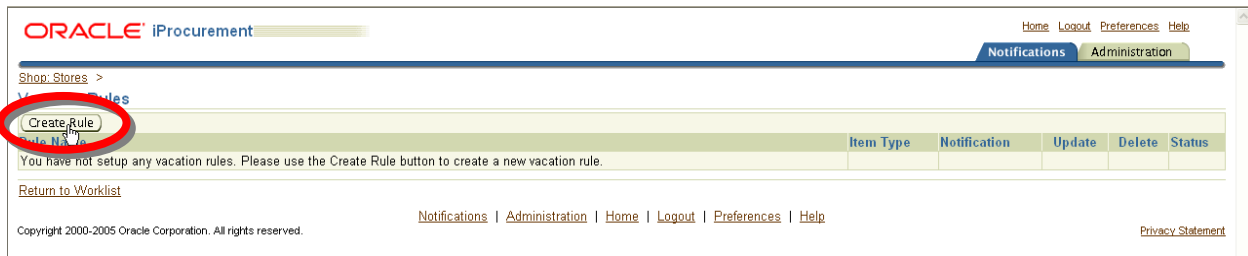
Rule Name	Item Type	Notification	Update	Delete	Status
You have not setup any vacation rules. Please use the Create Rule button to create a new vacation rule.					

Return to Worklist

Notifications | Administration | Home | Logout | Preferences | Help

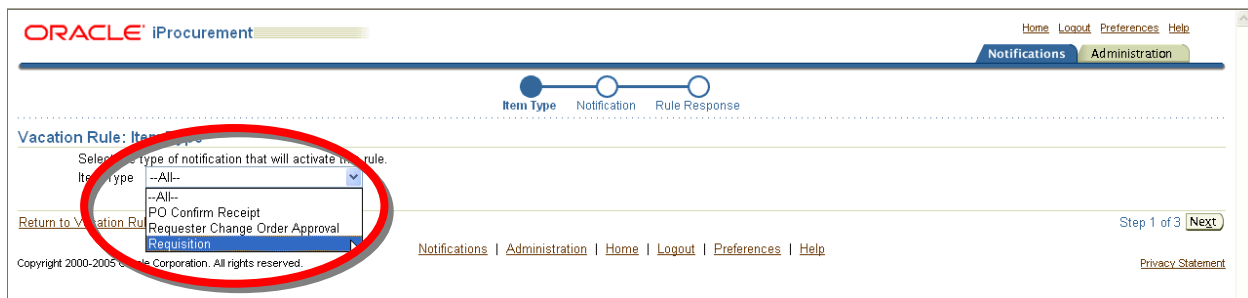
Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

On the *Vacation Rules* page, click on the **Create Rule** button to be guided through the following three steps: (1) Notification Type, (2) Notification Format, and (3) Define Rule.



Step 1: Item Type

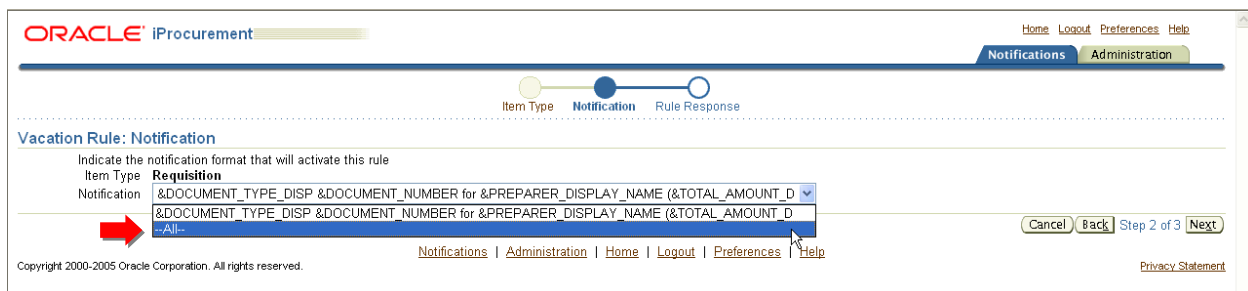
The options displayed will differ based on the rights and privileges assigned to your UserID. This is the page where you can choose what type of Notification Rule you want to create. An Approver wishing to have another Approver act in his/her stead should choose **Requisition** from the *Item Type* drop down menu.



Once you have changed the *Item Type*, click on the Next button to move on to Step 2: Notification

Step 2: Notification

This is the page where you select the format in which the Notification will be sent to the Proxy. The default only covers one message type. Click on the arrow of the drop down menu and select **All** from the menu.



When the **All** is selected for *Notification*, click on the **Next** button to continue to Step 3 – Vacation Rule: Rule Response.

ORACLE iProcurement

Home Logout Preferences Help

Notifications Administration

Item Type Notification Rule Response

Vacation Rule: Notification

Indicate the notification format that will activate this rule

Item Type **Requisition**

Notification **All**

Cancel Back Step 3 of 3 Next

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Notifications Administration Home Logout Preferences Help

Privacy Statement

Step 3: Rule Response

IAS provides a number of options to define your Notification Rule. This is where you set the duration of the Notification Rule and what rights you want to give the Approver who will be acting as your proxy.

ORACLE iProcurement

Home Logout Preferences Help

Notifications Administration

Item Type Notification Rule Response

Vacation Rule: Response

* Indicates required field

Item Type **Requisition**

Notification **All**

* Start Date 29-Nov-2006 11:02:33

(example: 30-Nov-2006 15:06:38)

End Date

Message

Comments will display with each routed notification

☒ Reassign All Employees and Users

☒ Delegate your response

A manager may delegate all expense report approvals to an assistant.

☐ Transfer notification ownership

A manager may transfer a notification for a specific project to the new manager of that project.

☐ Deliver notifications to me regardless of any general rules

Cancel Back Step 3 of 3 Apply

Copyright 2000-2005 Oracle Corporation. All rights reserved.

Notifications Administration Home Logout Preferences Help

Privacy Statement

Enter in the appropriate information.

Start Date

This is the date and time you would like your rule to begin. The format for this is DD-MMM-YYYY 00:00:00. For example, April 5, 2006 2:30 pm is expressed as 05-APR-2006 14:30:00.

Note: This will default to the current date and time.

Tip! You can use the calendar feature for this date, just like the Need-By Date used when creating a Requisition. Simply click on the **Calendar** icon to quickly find a date.

End Date

This is the date and time you would like your rule to end. The format for this is DD-MMM-YYYY 00:00:00. For example, April 5, 2006 2:30 pm is expressed as 05-APR-2006 14:30:00.

Tip! It is highly recommended that users set up an End Date for any Notification rules they create. If there is no End Date, you will have to remove the Notification Rule yourself.

Message

This is the message that the Proxy Approver will get with each Notification sent out.

Reassign

This option allows you to reassign your notifications to another user to act on your behalf. There are two types of reassignments: (1) Delegate your response and (2) Transfer Notification Ownership.

1. **Delegate your response:** This allows you to have another Approver work on your behalf, but you will retain the ownership of the document. That way, if there are errors that you need to correct later, you will still be able to find the document.
2. **Transfer notification ownership:** This option allows you to transfer ownership of a document to another user.

Warning! If you transfer ownership of a document, you will not be able to work on that document in the future, even after the rule has ended or been removed.

Deliver Notifications to me Regardless of any general rules

This option allows you to override all previous rules created. This has the same effect as erasing all of the rules.

Once you have updated all the field appropriately, click on the **Apply** button to complete the rule setup.

ORACLE iProcurement

Home Logout Preferences Help

Notifications Administration

Item Type Notification Rule Response

Vacation Rule: Response

Indicates required field

Item Type: Requisition

Notification: All

* Start Date: 29-Nov-2006 11:02:33 (example: 30-Nov-2006 15:06:38)

End Date: 04-Dec-2006 12:03:48

Message: Please take care of any notifications that come in during my vacation.

Comments will display with each routed notification

☒ Reassign: All Employees and Users MANAGER, LAURA

☐ Delegate your response
A manager may delegate all expense report approvals to an assistant.

☐ Transfer notification ownership
A manager may transfer a notification for a specific project to the new manager of that project.

☐ Deliver notifications to me regardless of any general rules

Cancel Back Step **Apply**

Notifications Administration Home Logout Preferences Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

This will take you to the *Vacation Rules* page where you can see your Rule.

ORACLE iProcurement

Home Logout Preferences Help

Notifications Administration

Shop Stores >

Vacation Rules

Create Rule

Rule Name	Item Type	Notification	Update	Delete	Status
Delegate: MANAGER, LAURA	Requisition	<All>			Active


Return to Worklist

Notifications Administration Home Logout Preferences Help

Copyright 2000-2005 Oracle Corporation. All rights reserved. Privacy Statement

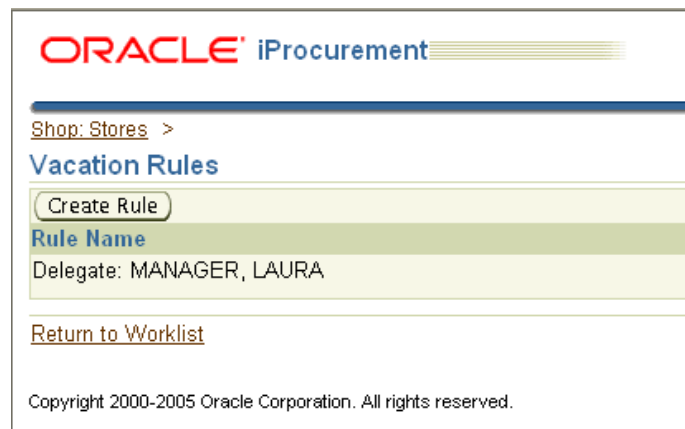
Note: The rule set up in this example has a status of *Active* because it was set to start immediately. If the rule you create is set up to start at some future date, it will be listed as *Inactive* until it goes into effect.

Warning! Rules can take up to 1 hour to take effect, even if they are set to go into effect immediately.

If you need to update the rule, simply click on the **Pencil** icon  in the *Update* column.

If you need to delete the rule, click on the **Trash Can** icon  in the *Delete* column.

To return to the *Shop* page, click on the **Shop: Stores** link in the top-left corner of the screen.



The screenshot shows the Oracle iProcurement interface. At the top is the Oracle iProcurement logo. Below it is a breadcrumb trail: [Shop: Stores](#) >. The main heading is "Vacation Rules". Under this heading is a "Create Rule" button. Below the button is a table with one row. The table has a header row with the text "Rule Name" and a data row with the text "Delegate: MANAGER, LAURA". Below the table is a link: [Return to Worklist](#). At the bottom of the page is the copyright notice: "Copyright 2000-2005 Oracle Corporation. All rights reserved."